



COALITION
MANAGER

USER HANDBOOK

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Introduction

Welcome to the **Coalition Manager User Handbook**, created by **Element 74** to help you confidently navigate every aspect of the system.

Working with data, reporting, and configuration can be complex, this guide breaks it down into clear, step-by-step instructions so you can manage your site with ease.

Each section includes:

- Detailed walkthroughs of every module, tile, and feature
-  **Video tutorials** demonstrating setup and best practices
- Color-coded headers and icons that make information easy to find

This handbook covers all default modules and settings in Coalition Manager.

Your site may include additional modules or display features differently based on your configuration or user role.

If you encounter functions not described here, contact the **Coalition Manager Support Team** for assistance:

support@coalitionmanager.org
800-350-9973

Updated January 2026 - 2025 Q2 Features



Navigating This Handbook

This handbook is organized by modules and features.

Start with **General Guidelines and Definitions** to learn terms and tools that appear throughout the system, then move into module-specific sections for detailed setup and workflows.

Each section uses consistent formatting, color headers, and icons to make information easy to find.

Note: If your site configuration or access level differs, some settings described in this handbook may not appear on your screen.

Header and Title Colors

Headers and titles are color coordinated to represent different groupings.

LIGHT BLUE	Main module or top-level section
ORANGE	Subsections within modules and features
PURPLE	Instructions on main features.
GREEN	Advanced or feature-specific customization (often shown in callout boxes)

Icon Guide

Icons help you quickly identify key details throughout this handbook.

Icon	Meaning	Description
	Optional Feature/Setting	Used for features that are not always enabled. These may require activation or setup by CM Support before they appear on your site.
	Premium Feature	Paid or upgraded feature not included by default.
	Note	Important detail to consider when setting up your site.
	Tip	Helpful shortcut, best practice, or time-saver.
	Third Party Integration	Identifies features integrated with a third-party system (e.g., MailJet, PayPal, Stripe).
	Video Tutorial	Step-by-step walkthrough showing how to set up or customize a feature.



Glossary of Terms

This glossary defines common terms used throughout Coalition Manager.

Understanding these terms will help you navigate the system, follow instructions, and communicate clearly with your team and CM Support.

Term	Definition
Archived Configuration Search	Allows access to data tied to dropdown options or settings that have been archived. Click “Filter records by archived items” at the top of search pages to view these results.
Contact	Any person or organization with details in Coalition Manager. Contacts may or may not have login access. For Contact Organizations, the person listed in Basic Information is the primary point person for the Contact Org..
Contact Type	Categorizes Contacts and defines what each group can access in Coalition Manager. Determines visibility, renewal requirements, data collection points, and permissions.
Custom Forms	Module used to create and collect data through surveys, registrations, or other form-based tools.
Data Grid	Displays items or search results in table format. Allows filtering, grouping, sorting, and exporting.
Data View	Displays summarized results for grouped or filtered data. Used for totals, counts, or comparisons.
Description Box	Text field that supports formatted text, links, images, and file uploads. Used for entering narrative details.
FTE (Full-Time Equivalent)	Represents the percentage of time an employee’s work is funded under a specific grant or project.
Label	Custom tag used to categorize or identify organizations, funders, or activities. Managed in System Configuration.
List View	Displays individual records in rows. Allows you to open, edit, archive, or print entries.
Module	Major section of Coalition Manager used for data entry or reporting (e.g., Trainings, Technical Assistance, Project Activity).
Coalition Admin	Highest access level for your organization’s staff. Can edit and customize settings across modules, manage users, and view reports.



Coalition Staff	Default role for your organization's staff. Can complete daily data-entry tasks and create/edit/view module information.
Quick Search	Provides fast access to previously saved search criteria or frequently used search results.
Report	A data summary or list generated from search results in any module. Report search criteria can be saved for future use.
Resource Manager	Module used to upload and share documents, links, or materials for public or member access.
Saved Layout	A customized grid layout that saves filters, column order, and groupings for future reuse. Layouts are user-specific.
Saved Report	A saved search filter set that can be reopened or shared across modules. Saved reports show up in Quick Search sections.
Site	Refers to your organization's instance of Coalition Manager. Each site operates independently with its own configuration and users.
Technical Assistance (TA)	Module used to record and track capacity building assistance provided to partners or member organizations.
Time Tracker	Module used to log staff time by funding source, project, or activity.
Training / Event	Module used to manage training sessions, track attendance, and record evaluations.
Translate	Tool that converts all visible content into another language. Does not alter stored data.
Unique Identifier	<p>The email address serves as the unique identifier in CM.</p> <p>Email address links all records tied to a person - including registrations, donation history, Technical Assistance/Project Activity received, and Contact Information.</p> <p>Staff listed under a Contact Organization are also linked to that organization's data.</p>
User (Contact with System Access)	Contact with login access to Coalition Manager. Can complete trainings, forms, and other activities available to their Contact Type.



General Guidelines and Definitions

This section explains common terms and tools used throughout Coalition Manager. Understanding these shared functions will help you navigate, enter data, and manage information efficiently.

Contacts and Contact Types

Contact: A Contact is any person or organization with details in Coalition Manager.

- Contacts may or may not have system access.
- For **Contact Organizations**, the person listed in *Basic Information* is the **primary contact**.
- Other staff should be added under the organization's **Staff List** and are not created as separate Contacts.
- Examples: Individual Member, Training Attendee, Partner Organization.
- **⚠ Note:** Only Contacts in a Contact Type with system access can log in to Coalition Manager.

Contact Type: Contact Types categorize Contacts and define what each group can access in Coalition Manager.

- They determine visibility, renewal requirements, and permissions across your site.
- Examples: Program Member, MDT Partner, Government Agency, Volunteer.
- Contact Types are created and managed in **System Configuration > Contact Manager > Contact Type** by Coalition Admins or CM Support Staff.
- **⚠ Note:** Updates to Contact Type settings affect access, renewals, and directory visibility for all users in that group

User Access and Roles

Roles determine what each user can view or edit in Coalition Manager. Access levels define the permissions for managing modules, configurations, and records within your organization.

Access Type	Description
Super Admin / CM Support Staff	<ul style="list-style-type: none">• Highest system-wide access.• Reserved for Coalition Manager Support Staff to enable or disable system features, adjust configurations, and troubleshoot issues.
Coalition Admin	<ul style="list-style-type: none">• Highest access level for your organization's staff.• Admins can edit and customize settings across all modules, including: managing Coalition Staff user roles, updating Contact Types, approving/viewing all staff timesheets, updating billing information, and configuring site-wide settings.• Only select staff should be assigned this role, since changes made by Coalition Admins impact the entire system.
Coalition Staff	<ul style="list-style-type: none">• Default access for your staff.



		<ul style="list-style-type: none"> Email addresses entered in Contact Manager > Staff automatically receive this role. Staff have limited visibility in System Configuration but can complete most daily tasks such as entering Technical Assistance, Project Activity, and creating Training.
User (Contact with System Access)	Contact Admin	<p>Organization Contacts: The primary email address listed in an organization's profile automatically becomes the Contact Admin.</p> <ul style="list-style-type: none"> Additional staff can be granted admin access. Contact Admins can manage membership renewals, pay dues, update organization details, manage staff, view and download training records for all staff, and register staff for trainings or e-learning courses. <p>Individual Contacts: Automatically have admin-level access for their own record, allowing them to update details, submit forms, and pay dues directly.</p>
	Contact Staff	<ul style="list-style-type: none"> Staff listed under a Contact Organization. Can log in, register themselves for trainings, complete forms, and access resources open to their access level. Can update their own information but cannot edit organization-level details.
Donor		<ul style="list-style-type: none"> Users who created a login account after donating. Can log in to view their own donation history, make another donations, and manage recurring gifts. No access to other modules unless they are also listed as a Contact within a Contact Type that has System Access. Can access Resources, Trainings, and Forms that are open to the Public.

When a New User is Added

When a new user account is created in Coalition Manager, or when a donor makes a first-time donation, the system automatically sends two emails to guide account setup and login:

- **Validate Email:** Sent immediately after the user is added. Includes a link to confirm their email address and create a password.
- **Contact Welcome Email:** Sent after setup is complete. Confirms the account is active and provides login access.

⚠ **Note:** Email content can be customized by your organization's designated staff within MailJet.

⚠ **Note:** If a user does not receive their welcome email, check their spam or junk folder, confirm that their email address is correct in **Contact Manager** or confirm in MailJet that the email was sent.



Modules

Modules are the main areas of Coalition Manager displayed on the **left-hand dashboard** after login. Each module focuses on a specific type of information or activity, such as trainings, technical assistance, or time tracking.

Standard Modules:

- **Technical Assistance (TA):** Record and track support provided to partners or members.
- **Project Activity (PA):** Manage and report on funded project work.
- **Trainings/Events:** Create, register, and manage training events and attendance.
- **Resource Manager:** Upload and organize documents, links, and downloadable materials.
- **Time Tracker:** Record and report staff time by project, activity, or grant.
- **Contact Manager:** Maintain organizational and individual contact details.
- **Custom Forms:** Create surveys, applications, and data collection forms.

★ **Optional Modules:** Some sites include additional premium modules that can be enabled by CM Support Staff based on your configuration needs. **These modules require an additional cost and are not included in every site's subscription.** Common examples include:

- Common examples include:
 - **Lending Library:** Track borrowed physical items such as books, DVDs, or resources.
 - **Forum:** Facilitate peer discussion and topic-based collaboration.
 - **Legal Services:** Manage scheduling and reporting for attorney-led appointments.
 - **Merit:** Connect to pre-created on-demand micro learning courses on non-profit professional development.

⚠ **Note:** Module visibility depends on your access level and site configuration. You may not see every module listed here.

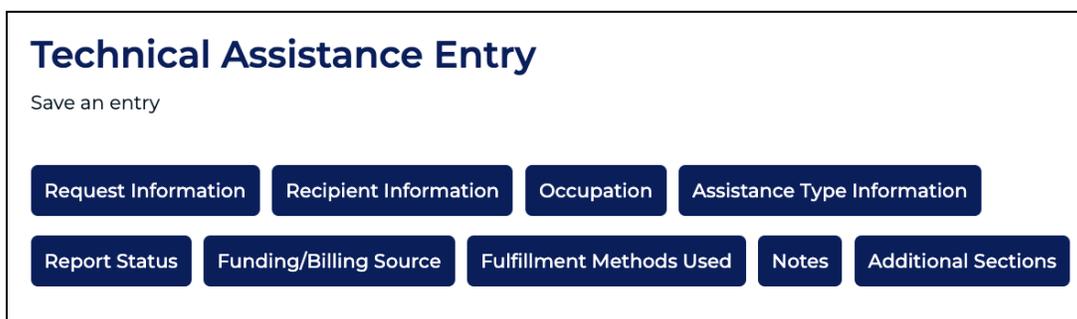
Navigation and Interface Tools

These tools help you move between sections, locate data, and manage information efficiently within Coalition Manager. They appear throughout most modules and function consistently across the system.

Dashboard and Module Navigation: When you log in, your dashboard displays the list of available modules along the left-hand side of the screen.

- Select a module to open its corresponding dashboard and begin viewing, adding, or reporting data.
- The modules displayed depend on your site configuration and access level.

Section Buttons: Use the blue buttons at the top of most pages (such as TA Entry, PA Entry, or Contact Details) to move down to specific sections within the same record.



Translate: Click the Translate icon in the top toolbar to convert all visible content - including labels and instructions - into another language.

- Translations apply immediately to your screen view but do not change saved data.



Saved Layouts and Data Grids

Saved layouts allow you to customize how data appears in any Coalition Manager grid. You can rearrange columns, apply filters, group results, and save that view for future use.

These options appear throughout multiple modules, including **Trainings, Technical Assistance, Project Activity,** and **Custom Forms.**

Save and Reuse Layouts

After customizing a grid, you can save the layout to reuse later.

- **To Save a Layout:**
 - Arrange columns, filters, and groupings as desired.
 - Click **Save Active Layout** and name your layout.
 - The saved layout will automatically load the next time you open the page.
 - To switch or delete saved layouts, use the **Layout List** menu.
 - 🧑 **Video Tutorial:** Demonstrates how to customize, save, and reuse data grid layouts. <https://www.loom.com/share/d401985bdac4436eb422245edece0321>
 - ⚠️ **Note:** Saved layouts are user-specific. Other staff will not see your custom views unless shared reports are used.
 - ⚠️ **Note:** System-wide updates may add or remove column options, which can reset or hide parts of your saved layout. If your **Export to Excel** or **PDF** buttons disappear, delete the Saved Layout and create it again.

Customize a Grid

You can change what data appears and how it's displayed to make reports or searches easier to read.

- **Grid Tools:**
 - **Add / Remove Columns:** Click the ... (**ellipsis**) icon to adjust visible columns.
 - **Filter Results:** Use filter boxes at the top of each column to narrow data by keyword or category.
 - **Resize Columns:** Adjust width or record count to fit your screen.
 - **Sort Columns:** Click a header to sort ascending or descending.
 - 💡 **Tip:** Hold **Shift** while selecting additional headers to sort by multiple columns.

Group and Count Records

You can group records in any grid to organize data and most grids display totals for grouped items. For example, grouping by **Occupation** in a Contact search will show how many records fall into each category.

- Click and drag a column header (such as *Occupation*) into the gray toolbar above the grid.
- Coalition Manager automatically groups results and displays a count for each category.
- You can group by multiple columns to view combined totals (for example, *County* and *Occupation*).
- 🧑 **Video Tutorial:** Demonstrates how to group data and view automatic record counts in any Coalition Manager grid. <https://www.loom.com/share/2f111051e8104d8d8faee8746afb4d44>

Saved Reports

Saved Reports allow staff to save and reuse specific search criteria in any module that includes



reporting.

This helps save time by letting you re-run common searches - such as quarterly reports or training summaries - without rebuilding filters each time.

You can open any saved report directly from this section to reload the search filters and regenerate the results.

Find Saved Reports

Each module that includes reporting (such as **Training/Event Data**, **Technical Assistance**, **Project Activity**, and **Combined Reports**) contains a **Saved Report** section or tab.

- Tabs at the top of the page include:
 1. **My Reports:** Reports you personally saved.
 2. **Other Available Reports:** Reports shared by other staff.
 3. **Archive:** Reports that have been stored for reference but are not active.

Save a Report

- Apply your desired filters and run the search.
- When results appear, click the prompt: *"If you'd like to save/update these criteria for quick search, please Click Here."*
- Enter a title for your report.
 - Choose visibility:
 - **Accessible to everyone:** All staff can view.
 - **Accessible only to you:** Only you can view.

Access and Manage Saved Reports

- **Duplicate:** Click the duplicate icon to copy the search criteria to create another saved search.
- **Go to Saved Reports:** Click on the icon to go to the search page with the saved filters already selected. This will open a new tab. Click FILTER to regenerate results.
- **Edit Info:** Change the report title or update sharing settings.
- **Archive:** Remove a report from the active list without deleting it.
- **Copy Link:** Share a report URL with others in your organization.
 - ⚠ **Note:** Recipients must be logged into Coalition Manager with the appropriate staff access level to view the report.
 - 🎥 **Video Tutorial:** Demonstrates how to create, manage, and share saved reports across modules. <https://www.loom.com/share/24nov2021-saved-report-example>

Search Options

Search results display in a **data grid**, which can be filtered, grouped, or exported to Excel or PDF. Use grid tools to adjust columns, group results, or save layouts for future use.

Advanced Search: Select from any available criteria to filter results.

- Selecting **no criteria** will display all entries within that module.
- Selecting **multiple criteria** will narrow your results accordingly.
- If you do not find the data you need, try removing or reducing filters.

Quick Search: Provides quick access to previously saved reports for faster lookups.

- **Archived Configuration Search:** If dropdown lists or system configurations have been changed or archived, click the hyperlink **"Filter records by archived items"** at the top of the search page. This allows you to locate data tied to older or discontinued configuration options.



- **Note:** Saved or archived configuration filters allow access to historical data even after system updates.

List View: displays individual records in rows. You can open, edit, archive, or print each entry directly from the list.

Data View: Displays summarized results for grouped or filtered data. It's best used for reviewing totals, comparisons, or counts at a glance.

- **Data View Tools:**

- Expand or collapse sections to focus on a category.
 - Adjust columns or filters for easier review.
 - Apply or load Saved Layouts to customize your display.
-

Description Boxes and File Uploads

Description boxes and file upload fields appear throughout Coalition Manager.

These tools allow you to enter detailed information, upload documents, and include additional materials in your entries.

They function consistently across all modules, such as Trainings, Technical Assistance, Project Activity, and Custom Forms.

Description Boxes: Description boxes are used to enter narrative information or additional details related to an entry. They support formatted text, hyperlinks, and images to help you capture context or supporting details.

- **Features:**

- Add rich text formatting, bullet points, or hyperlinks.
- Insert or upload images and files directly into the box.
- Import content from a Word or PDF document.
- Export text to a file for offline reference.
- Drag the corner of the box to resize.

Tip: Use description boxes to record meeting notes, training summaries, or project narratives for reporting.

Note: Copying formatted text into a CM text box removes the original formatting. Use the formatting tools in CM or use the import feature to keep formatting. Formatting inside description boxes is retained when exported, but printed reports may display it differently depending on your site's setup.

File Uploads: File upload fields appear in multiple areas of the system, including Custom Forms, Training Events, and Contact Details. They allow you to attach documents, media, or supporting materials directly to records.

- **How to Upload Files:**

- Click **Upload** or **Choose File** in the upload field.
- Select your file from your device.
- Once uploaded, the file name will display in the field.
- To remove a file, click **Delete** or the trash icon (🗑️).

Note: If an upload fails due to file size or connection issues, click the **retry** icon to continue. Coalition Manager uses multipart uploads, so most temporary errors resolve automatically when retried.



General System Configuration

The General System Configuration section controls global settings, default behaviors, and appearance options that impact multiple modules across your site. These settings apply system-wide to all users and modules.

Your Coalition Manager system is highly customizable. Labels, dropdown lists, and menu options, such as Funding Sources, Program Types, and Regions, can be edited by Admins at your organization to match your site's setup.

System Configuration is accessible to all staff listed in your Staff List, but access and visibility depend on each person's assigned role. The following configuration sections are accessible to anyone in your organization who has a profile in Contact Manager > Your Staff:

 **Video Tutorial:** View an overview of settings and options available in General System Configuration: <https://www.loom.com/share/bea66275e78547fd9bf18f65f6838a5a>

Announcements

Announcements appear on users' dashboards and are a great way to share updates such as due dates, staff changes, policy alerts, or system reminders. Users must log in to see announcements.

 **Tip:** Rearrange the order of announcements on the CM dashboard by dragging the item up or down in the Announcements grid.

Create an Announcement

- **Title:** Enter the heading. (appears in bold on the dashboard)
- **Announcement:** Create and format your message. You can embed videos, GIFs, and links.
- **Any Link?:** Check to display a clickable button below the announcement.
 - **Link Text:** Enter the button label (e.g., *Complete Survey*).
 - **Link:** Paste the full URL (must include <http://> or <https://>).
- **Is Visible?:** Check to publish or leave unchecked to keep in draft mode.
- **Announcement Access:** Select visibility.
 - **Only Staff:** Only visible to your organization's staff.
 - **Open to All:** Visible to all users.
 - **All Contact Types with Login:** Visible to all Contacts with system access.
 - **Specific Contact Types with Login:** Limit to selected Contact Types.
 - **Add Specific Contact:**
 - **Contact Type:** Select the Contact Type(s) who should see the announcement. If no specific Contact or Contact Staff restrictions are added, *all contacts within this Contact Type will see it.*
 - **Contact:** Select an individual Contact (organization) to narrow visibility. If the Contact is an organization and no Contact Staff are selected, *all staff under that organization will see it.*
 - **Contact Staff:** Select specific staff (if applicable) to further restrict access to only those individuals.
 - **Specific Staff:** Visible only to designated staff members.
 - **Specific Access Group:** Restrict to selected Access Groups/Committees.
 - **Donors:** Visible to users with a donor profile.
- **Announcement Start and End Date:** Set dates and times for announcements to



automatically publish and unpublish.

Announcement Banner Colors: Announcement banners display with preset background colors in the following order: Light purple, cream, light green, gray, light blue. All additional announcements beyond the fifth will have a white background. *Banner colors are not customizable at this time.*

 **Video Tutorial:** Learn how to create, edit, and reorder announcements on your CM dashboard. <https://www.loom.com/share/73b30d8bf037424ebc7c191ab9b61423>

FAQ Category

FAQ Categories help organize Frequently Asked Questions into sections that make it easier for users to find information. Each category appears as a **clickable button filter** on the FAQ page, allowing users to quickly view questions related to a specific topic.

Create a New FAQ Category

- Click **Add New**.
- **Category Name:** Enter the Category Name.
- (Optional) To create **Subcategories**, click the **eye icon**  and add subcategory names.

FAQ

Create and organize **Frequently Asked Questions (FAQs)** to help users quickly find answers to common questions.

FAQs can be accessed by clicking the **?** icon at the top of the screen or the arrow (v) next to your name.

 **Note:** Categories must be created before FAQs.

Create a New FAQ

- Click **Add New**.
- Select a **Category** (and **Subcategory**, if applicable).
- **Question:** Enter the **Question** (e.g., “How do I add a new contact?”).
- **Response:** Enter the answer in the **Response** field. Use formatting tools to add links, images, or attachments if needed.
- **Publish:** Check to make the FAQ visible, or leave it unchecked and unpublished to continue editing.
- **Has Link?** (Optional) Check this box to display a clickable button below the FAQ that opens a webpage or video.
 - **Link Text:** Enter button label (e.g., *More Info*).
 - **Link:** Paste the full web URL. (include http:// or https://).
- **Access:** Select who should see the FAQ.
 - **All:** All users
 - **Site Staff:** All staff at your organization
 - **Site Admin:** Only staff at your organization who have Admin status
 - **Contact Types with User Access:** Each Contact Type will be listed out separately.
- **Tags:** Add tags to group similar FAQs for easier filtering and searching.



 **Video Tutorial:** Learn how to create and organize Frequently Asked Questions:
<https://www.loom.com/share/31cd1f55bc3c47bcb039ea8823980ce7>

Non Organization Trainers

Names added as Non-Organization Trainers will appear as trainer options in the **Event Details** section of the Training/Events Module. Hours and funding sources can later be attributed to these trainers, which is helpful for reporting on frequent partners or consultants.

 **Video Tutorial:** Learn how to add guest facilitators and track their hours or funding sources for reporting. <https://www.loom.com/share/56e5c89cfc234ad982d83c40d7197585>

 **Note:** Information added in this section is optional and will not create any email notifications or CM user accounts for this person. This feature is for internal tracking purposes only.

Create a Non Organization Trainer

Once saved, the trainer's name will appear as an option under Non-Organization Trainer when creating or editing a training event.

- Click **Add New** and enter any of the following information, as needed:
 - Prefix
 - First Name
 - Middle Name
 - Last Name (*required*)
 - Pronoun
 - Organization
 - Email
 - Phone



Contact Manager Module

The Contact Manager Module stores and manages all Contacts in your system, including member organizations, their staff, stakeholders, community partners, and other users.

Information entered in Contact Manager populates an online member directory, supports exports to integrated email marketing platforms, and fills dropdown lists in modules such as **Technical Assistance, Project Activities, and Training/Events**.

Contact Basics

Each Contact is connected to a unique record used across modules, reports, and directories.

Email is the Unique Identifier: The email address uniquely identifies each user in Coalition Manager and links all related records (Event registrations, Donations, Contact/Contact Staff profiles, etc.).

- **⚠ Note:** Since email address uniquely identifies a person and their records, the same email address cannot be used for two or more people. Each person must have their own email address.

Contact Type: Each Contact/Contact Staff belongs to one Contact Type, which controls collected fields, login access, visible modules, and other key data points.

Coalition Staff also appear in Contact Manager. Since **you are not considered Contacts**, and have a different access level (i.e. "Role"), your profiles are created in the Coalition Staff section.

Directories:

- All Contacts appear in the internal **Contact Directory**, which is searchable by your staff.
- Only selected Contacts appear in the **Public Directory**.
- Each Contact record can include addresses, phones, social links, staff emails, services, and languages.

Contact Admin Permissions: For Contacts that are Organizations, their Contact Admins can manage their organization's information, including addresses, staff lists, and public directory visibility.

Coalition Admin Management: Only your Coalition's Admins can manage system-wide contact settings in **System Configuration**, including:

- Creating/editing Contact Types and data fields
- Determining which modules are available by Contact Type
- Upgrading access levels for your staff (changing from staff role to admin role)
- Creating/editing Labels for contact service lists, service types, regions, languages, counties, and social media fields



Dashboard

The Contact Manager Dashboard is your main workspace to view, search, and manage Contacts and organizations. From here you can add new Contacts, review recent activity, manage users, and access saved searches or reports.

 **Video Tutorial:** Learn how to navigate the Contact Manager Dashboard and use quick search tools. <https://www.loom.com/share/ccee01f26f574be285ce9ee2a505d90c>

Quick Search: Use the search bar at the top left of the dashboard to find a Contact or Contact Staff.



The screenshot shows a search bar with a dropdown menu containing the text "Select contact" and a downward arrow. To the right of the dropdown is a checkbox labeled "Include Archived?".

- Check **Include Archived** to include Contacts or staff who have been archived.
- Begin typing to view matches and click a name to open the **Details** page for that Contact.

 **Note:** Coalition/Association staff are not considered Contacts and won't appear in Contact dropdowns nor quick search.

Navigation Buttons: Navigation buttons at the top of the dashboard provide quick links to the main Contact Manager sections, such as Contacts, Users, Directory, and Reports. These options will mostly mirror the menu items listed on the left side of the page.

Below the navigation buttons, the dashboard displays:

- **Recently Added Contacts:** Newly created individual and organizational records.
- **Recently Added Users:** New user accounts with system access.

New Contact

The New Contact screen is the first step to add a new Contact record. Only basic information is entered here; after saving, you add further details to complete the record on **Contact Details**.

A Contact can be an **individual** or an **organization**. Staff of an organization should **not** be added as separate Contacts, add them to the organization's **Staff List**.

 **Note:** Email addresses are unique and connect all related records.

 **Video Tutorial:** Learn how to add new Contacts and understand which fields are required. <https://www.loom.com/share/c43e4ce1af7b46dd9b76092a9aa6742d>

Create a New Contact

- **Contact Type**
- **Organization/Employer** (optional)
- **Name** - Depending on your site setup, this may include Prefix, First, Middle, or Last Name, Suffix, or Pronouns.
 - If the Contact represents an organization, enter the primary staff person's (e.g., Executive Director) details



- This email becomes the default admin for an organizational Contact.
- **Email:** Serves as the **unique identifier**. Connects all related records for the individual and their organization, if applicable.
 - Email addresses also serve as usernames for users.
- **Add to Mailing List?** Checked by default. Uncheck if you do not want to add the email address to your connected Email Marketing System nor any email lists.
- **Display Name Priority:**
 - **Individual:** Select if this Contact is a person and not an organization. It displays the person's first and last name more prominently.
 - **Organization:** For Contacts that are organizations, select this to more prominently display the organization name instead of the main point person.
- **Display Contact in Public Directory:** Unchecked by default
 - When selected, the Contact (individual or organization) becomes searchable in the Public Directory.
 - Enabling this option also opens a **Public Directory Intro** field to add a short description for the directory listing.
- **Job Title**
- **Occupation**
 - If you choose "Other," a description box will appear to enter additional details.
- **Mailing Lists:** Select applicable mailing lists. If the Contact Type is associated with any mailing list(s), these will be displayed by default.
- **Organizational Email:** Add an additional email address for display or informational purposes only.
 - **Display Organizational Email in Public Directory?:** Check this box to show the organization's email publicly in the directory.
 -  **Video Tutorial:** Add an organizational email and control visibility. <https://www.loom.com/share/7115196fc651466aa73386d90d1521e8>

After clicking **Save**, you're redirected to **Contact Details** where additional sections appear based on Contact Type. Click **Edit Basic Information** to edit these main contact fields again.

 **Tip:** To add multiple Contacts at once, Coalition Admins can use the **Bulk Import** option accessible through **Contacts List**.

Contact Details Sections

Sections and fields vary by Contact Type (configured in **System Configuration > Contact Manager > Contact Type**).

 **Tip:** Use the section buttons to jump directly to different areas of the Contact Details page, or use the arrow to return to the top.

Update Contact Details Section

- Click **Add Addresses:** Multiple addresses can be added. Each address includes:
 - **Region**
 - **Hide in Service Reporting?:** This option is for regional reporting in Custom Forms. When selected, this address will be hidden from the list of a Contact's address options when choosing an associated address in a form submission.
 - **Address Type:** These labels are set up by your admins in System Configuration.
 - **Address Name:** Enter the location name
 - **Mailing Label Name:** Use a shorter name or acronym if the full name won't fit on a mailing label.



- **Street Line 1, Street Line 2, City, State, Country, Zip**
- **Country:** Defaults to the United States.
- **Is Receiving Paper Mailing?:** Check to include this address when generating a report to export mailing labels.
- **Display on Public Directory?:** Check to display this address on the Public Directory. The Contact must also have been added to the directory by checking the field **“Display Organizational Email in Public Directory?”**.
 - Ensure this is checked if you want the address to appear in Geo Coding, when that feature is enabled on the Directory.
- **👤 Video Tutorial:** Learn how to add and manage multiple addresses for a Contact. <https://www.loom.com/share/73c8c4badf4946edbf9d972ec4cf10c4>
- Click **Phone Numbers:** Add multiple phone numbers if needed. Each number includes:
 - **Phone Number Type:** These labels are set up by your admins in System Configuration.
 - **Description:** This will be how the phone number is described in the Public Directory if applicable.
 - **Phone Number and Extension**
 - **Display on Public Directory?** If the Contact appears in the public directory, check this box to display the phone number in their public profile.
 - **★ Is text opt in?:** This field only displays when the Texting feature is enabled. Check this box to enable this phone number to receive text messages.
 - **👤 Video Tutorial:** View how to send text messages through Coalition Manager: <https://www.loom.com/share/ce31ffe7a76b4a548063ce1974328d7c>
 - **👤 Video Tutorial:** Learn how to add, edit, and display phone numbers for a Contact. <https://www.loom.com/share/9da6fe2d8f4949fbaae2b232e8528c14>
- Click **Update Counties:** Select one or more counties served by the Contact.
- Click **Update Languages:** Select languages spoken at the Contact Organization.
- Click **Update Program Services:** Select languages spoken at the Contact Organization.
- Click **Update Program Types:** Select one or more categories that describe the Contact (e.g., Advocacy Services, Batterer Intervention Services, Prevention Services).
- Click **Update Regions:** Select one or more regions served by the Contact.
- **Social Media Information:** Add one or more social media links. Each entry will be hyperlinked for quick access.
 - **Social Media Type:** These labels are configured by admins in System Configuration.
 - **Social Media Link:** Copy and paste the full link for accuracy.
 - **Is Public?** If the Contact is in the public Directory, check to display the link in their profile.
 - **👤 Video Tutorial:** Learn how to add and manage social media links for a Contact. <https://www.loom.com/share/389aa1af96fb4ced9d867c6ba0c1c90d>
- **Mailing List:** If the Contact is an individual, select the mailing lists to include them in. If the Contact Type is associated with any mailing list(s), these will be displayed by default.
- Click **Update Required Document Types:** Use this section to require Contacts to upload documents on a specified schedule
 - In **System Configuration**, admins can assign required documents to all Contacts within a Contact Type. The default document types for that Contact Type will display here, but staff can edit this section to add or remove required document types as needed.
 - If all required documents for the Contact Type already apply, no changes are needed.
 - **👤 Video Tutorial:** Learn how to assign required documents to an organization. <https://www.loom.com/share/276eacdca5a146169586a31f34634359>
- Click **Add File Upload:** Upload and store documents directly on the Contact Details page. Only **Coalition Staff, Coalition Admins,** and **User Admins** can upload, view, or download files.
 - **Document Title:** Enter a clear name for the uploaded document.
 - **Document Information**



- **Document Type:** These labels are configured by your admins in System Configuration and may include due dates for annual updates.
 - **Document:** Select from your device the file(s) to upload.
 - **Document Effective From:** If an expiration date is attributed in System Configuration to the selected Document Type, an additional date field will appear. Select the date that the document becomes effective.
 - Blue text will indicate how long a document is valid.
 - The expiration timeline and validity period are configured by admins in **System Configuration > Contact Manager > Document Types**.
 - **Document Expiration Date:** If a date is put in the Document Effective From field, this field displays the date the document expires. It calculates expiry date based on the defined validity period set up in System Configuration.
 - **📺 Video Tutorial:** Learn how to upload, view, and manage document files for a Contact. <https://www.loom.com/share/afb25ce657bc4d70a5d1c1f1ba3a088>
 - **Logo:** Upload an organizational logo (**Recommended PNG, 180x160**).
 - Logos appear in the Public Directory when the organization is listed.
 - **📺 Video Tutorial:** Learn how to upload and manage organizational logos. <https://www.loom.com/share/30eeb7b5cfca44c1a01bfc4e9a29d57b>
 - **Module List:** Your Staff can further restrict module access from the default settings.
 - **No modules selected (Default):** The contact has access to all modules assigned to their Contact Type.
 - **Specific modules selected:** Limits the Contact's access to only the selected modules.
-

Organization Contacts: Staff List Details

Staff are added directly from the **Contact's Details** page.

📺 Video Tutorial: Learn how to add and manage staff under a Contact organization. <https://www.loom.com/share/7ea22e0f8d024af69809885089261a96>

Contact Staff added here:

- **Appear in dropdown lists** when Coalition Staff record Technical Assistance or Project Activities.
- **Receive system logins:** If the Contact Type has system access, each listed staff member automatically receives an email to set up their password for Coalition Manager login.
 - Once activated, staff can register for trainings and access member-only forms and resources.

Create a New Contact Staff

The following information can be entered for each staff member on their Staff Details page.

Click **Add Staff** to add an individual Staff.

- **Location Associated with this staff?** (Required): Select the address associated with this staff member.
- **Name:** Depending on your site setup, this may include Prefix, First, Middle, or Last Name, Suffix, or Pronouns (First and Last Names are Required)
- **Job Title**
- **Occupation:** Select from the Occupation list. This list matches the one used in the Training Module.
- **Email** (Required): Enter the person's email address. The email is the unique identifier linking all records for this individual and it ties them to their organization. If they register for events using the same email address, they will see their training records when logged in.



- **Add to Mailing List:** Checked by default. Uncheck this box to exclude the email address from your connected email marketing platform. The contact will not receive newsletters, and the **Mailing List** field will be hidden.
- **Is Administrator?:** Check this box to grant the staff member admin access within their organization's Contact profile.
 - If unchecked, the staff person can only view their own registrations, training profile, and form submissions.
 - **⚠ Note:** Marking a staff member as an Administrator gives them permission to edit the organization's contact details, pay membership fees, manage staff access, and run training attendance reports on all staff.
- **Display On Directory?:** For Contacts visible in the public directory, check this box to display the staff member's name and email address on their profile.
- **Hire and Termination Dates:** Used for reference or for the Training Compliance feature. These dates do not control system access.
 - **⚠ Note:** When staff leave the organization, archive their profile to remove access.
- **Certificate ID**
- **Modules:** If no modules are selected, the user has access to all modules assigned to their Contact Type. To restrict access, select specific module(s) from the dropdown list.
- **Mailing List:** Select any mailing lists assigned to this person from the dropdown. If the Contact Type is associated with any mailing list(s), these will be displayed by default.
- **Access Groups:** Access Groups are (usually) small permission-based groups to share resources, forms, or Training Events. Staff can be added or removed from Access Groups here in their Staff Profile, or they can also be managed in **Contact Manager > Access Groups/Committees**, which is where new Access Groups are created.
- Click **+Add Committee Group:** Committees function similarly to Access Groups but include roles and term dates. Members automatically roll on or off Committees based on these settings.
 - **Committee Group:** Select the committee. Committee labels are created in **Contact Manager > Access Groups/Committees**.
 - **Committee Position:** Select the assigned role. These labels are configured by admins in System Configuration.
 - **Term Start and End Date:** Enter the start and end dates for the staff member's committee term.
 - **Notes:** Optional field for additional details or comments related to committee membership.
- **🔧 Skip Compliance?:** If the Training Compliance feature is enabled, check this box to exclude this person from compliance requirements.
- Click **+Add Phone:**
 - **Phone Number Type:** These labels are set up by your admins in System Configuration.
 - **Add Description**
 - **Phone Number, Extension**
 - **★ Is text opt in?:** This field only displays when the Texting feature is enabled. Check this box to grant permission for this phone number to receive text messages.

⚠ Note: Coalition Admins can create **Custom Contact Staff Questions** to collect additional details from Contact Staff. These appear in the **Staff** section of the organization's **Contact Details** page and can be made visible to staff or kept internal, for tracking purposes.

Bulk Add Contact Staff to an Organization Contact

If adding multiple staff members at once, use the **Import Staff** feature to upload staff records in bulk.

- Click **Import Staff** under the **Staff List**.
- Download the Excel template provided.



- Always download a new template for each import.
 - Enter staff data into the template.
 - **Required fields:** First Name, Last Name, Email Address
 - Do **not** delete rows or columns
 - Do **not** change font or font size
 - Any edits to the template design will cause the import to fail.
 - Save the completed file to your computer.
 - Click **Import** again and select the saved file.
 - Choose the staff's address location and any applicable mailing lists.
 - Click **Import** to upload.
 - **⚠ Note:** A confirmation notice will display when the upload is successful. If any rows contain errors, they will be listed in the confirmation message.
-

Organization Contact Staff Grid

The grid includes four tabs to manage staff status:

- **Active:** Lists current staff for the organization. Contact Admins can edit or archive staff from this tab.
- **Archived:** Displays staff profiles that have been archived. Contact Admins should archive staff when they leave the organization. Archiving removes login access but keeps all historical records and training data.
- **Pending:** Displays staff access requests submitted through the Join Us page or staff association requests.
 - Contact Admins and Coalition Staff can **Approve** or **Deny** pending requests.
 - Clicking **Approve** opens the staff member's **profile** page to review or add information before saving.
 - Clicking **Deny** opens a confirmation screen asking, "Are you sure you want to deny this contact staff request?" You must confirm the denial and provide a reason.
 - Once denied, an automated email notifies the requester that their access was denied.
- **Denied:** Displays denied staff requests. Contact Admins can reopen any denied request by selecting **Approve**, which reopens the staff record for editing and saving.

⚠ Note: Approval automatically triggers the standard access emails to create password, while denial sends the requester a notification with the reason provided.

Contact Additional Information View

The Contact Additional Information section stores extended organizational data, membership fee settings, and internal notes. It may also include reporting or compliance fields customized by Coalition Admins.

This section captures organization-level data collected during renewals or profile updates. The available fields and fee structures are defined by Coalition Admins based on each Contact Type.

Contact Admins can view and update select information, while your Staff have access to view and edit all fields.

- **🎥 Video Tutorial:** Learn how your Staff can update the organizational details and membership settings in the Additional Information section.
<https://www.loom.com/share/3a15471e124d4993bcaf9c49768a6ca5>



-  **Video Tutorial:** Learn how Contact Admins update Additional Information, including how changes to budgets or staffing can affect membership fees.
<https://www.loom.com/share/8d24be1cffe94868b63e4223a6ba9567>

Update Additional Information

Click **Update Additional Information** to add or edit organizational details or adjust membership fee and payment options.

Field Visibility: Field display, labels, and fee formulas are managed by your Coalition Admins in **System Configuration > Contact Types > Additional Information**.

- Field labels can be customized, and some fields may not be visible or editable to **Contact Admins or Contact Staff**.

 **Note:** Questions can be customized, but each answer type must match the original format. For example, **Number of Board Directors** could be changed to **Number of Shelter Rooms**, since both require a numeric response.

The following list shows the default display settings:

- **Is 501(c)3?** Are they a non-profit?
- **Is a DVSS Contractor?** Are they a pass through organization? Clicking the button signifies yes to this question.
- **Annual and Program Budgets:** This field can be used to calculate membership fees when the fee structure is based on budget ranges or percentages.
- **Membership Fee:** There are several options for membership fee structures. Depending on the configuration under **System Configuration > Contact Types**, the fee can be set as a **Flat Fee** or a **Sliding Scale Fee** (based on budget or staff size).
 - Admins and staff can edit the fee for a specific contact as needed. Changes made this way affect only that contact.
 -  **Has Custom Membership Fee:** This checkbox is visible only to Coalition Admins. When selected, they can enter a custom membership fee for that specific contact. This overrides the default fee. When unchecked, the membership fee returns to the default amount.
 -  **Note:** Additional details are located in the Membership Renewal section of this handbook.
-  **Payment Plan:** If Payment Plans are enabled, select the desired schedule here. Options may include **monthly**, **quarterly**, or **biannual** (two times per year) payment schedules for membership dues.
- **Year Incorporated**
- **Program/Organization Start Year**
- **Number of Board of Directors**
- **Number of Staff Members:** If membership dues are based on staff count, this field affects the calculated fee.
- **Number of Volunteers**
- **Number of Shelter Beds**
- **Number of Transitional Housing Beds**
- **Notes:** Add internal notes for your Staff use. These notes are not visible to Contacts.
- **Mission Statement**
- **Payment Reminder Email:** Add additional staff email addresses to receive automated reminders about membership renewals. Separate multiple addresses with commas.
-  **Training Compliance Reminder email:** If the Training Compliance feature is enabled, notifications are sent to the listed address when staff fall out of compliance.
- **Federal ID Number**
- **Is Subsidiary of an Organization:** When this button is selected, enter:



- **Parent Organization Name**
 - **Approval Notification Email:** Add one or more staff email addresses to receive notification when a Contact Staff request is submitted through the public Join Us page.
-

Contact Additional Information Data History

The Contact Additional Information Data History section tracks and compares historical responses entered during membership renewal.

Contact Admins or Contact Staff can view their own history directly on their Contact Details page. Select different years in the gray box to toggle from year-to-year, or to view multiple years at a time.

Your Staff and Admins can view the same data from either the Contact Details page or the compiled **Contact Additional Information** section in Contact Manager.

 **Video Tutorial:** Learn how to view and compare historical Additional Information data. <https://www.loom.com/share/262bed44c5e546f785435cd35b219c9b>

 **Tip:** Coalition Admins define which Additional Information fields are collected and recorded during renewal by setting requirements for each Contact Type in System Configuration > Contact Types > Required Additional Information.

Payment Logs

The Payment Logs section shows all past membership-related payments for dues-paying organizations. Only Contact Admins and **your** Staff/Admins can view this section.

- **Online Payments:** Made by **credit card** or **ACH bank transfer**. Payment details display automatically after a member completes payment.
- **Offline Payments:** Made by **check** or other manual methods. When an offline payment is received, click the **checkmark icon** and enter payment details to record that it has been received. (See additional details below.)

The Payment Logs include two tabs:

- **Success:** Lists all successfully processed payments.
- **Error:** Lists payments that failed or were declined (for example, due to invalid card details).

Each tab displays the following columns:

- | | | |
|------------------|------------------|--|
| ● Date Processed | ● Reference | ● Last Four (digits of payment method) |
| ● Message | ● Invoice Number | ● Date Received |
| ● Notes | ● Discount Code | |
| ● Name | ● Amount | |

 **Note:** Payment amounts cannot be edited in this section. Contact CM Support Staff for corrections or adjustments.

Mark an Offline Payment as Received

- **Contact Selects Offline Payment Method During Renewal:** When a contact selects an offline payment method for membership dues, their **expiration date does not update automatically**. The payment must be marked as received before the renewal date advances.



- **Your Staff Receive an Email Notification:** Staff receive an email notification when a member chooses to pay by check. Click the link in the email to confirm receipt, or open the member's **Contact Details page** manually in Coalition Manager..
- **Click Checkmark:** In the Payment Log, click the ✓ Checkmark icon.
- **Verify Details:** Verify the payment details and confirm that the renewal date is correct.
- **Click Submit:** Mark the payment as received.
 - Once submitted, the payment is logged in both Contact Details > Payment Log and Combined Reports > Payment Log.
- **👤 Video Tutorial:** Learn how to record and confirm that an offline membership check has been received. <https://www.loom.com/share/b78f41ee06e14945ad9e3461a35d6ace>

Link Associated Contacts

The **Associated Contacts** feature connects users across different Contacts or Contact Types so their records remain visible even when they are not part of the same Contact. This is often used when a contact serves as a pass-through funder to other contacts, or when local organizations need access to view details for multidisciplinary team members or response groups.

This feature supports collaboration by allowing users to view training records, custom form submissions, and/or contact details for associated contacts.

⚠️ Note: CM Support Staff typically complete the initial setup for Associated Contacts, but Site Admins can manage configurations as needed.

👤 Video Tutorial: View how to configure and use Associated Contacts to connect related users across different Contact Types. <https://www.loom.com/share/89c7995924f54449b7ebec49c7c550a8>

Add an Association

Once a global connection is created between Contact Types in System Configuration, your staff can link individual users to their associated contacts directly from the Contact Staff Edit screen.

Associated contacts must be manually assigned by your staff or admins.

- Open the Contact Details page for the person(s) who will be able to view another contact's information.
- For contacts without staff lists, click Edit in the Basic Information section.
- For contacts with staff lists, go to the Staff section and click Edit next to the person you want to grant viewing access.
- Scroll to the bottom of the page and select Contacts or individuals under:
 - **Training Associated Contact List** - view training records of associated individuals
 - **Custom Forms Associated Contact List** - view form responses submitted by associated contacts
 - **Contact Details Associated Contact List** - view contact details of associated contacts
- Once linked, the user can view the corresponding information based on configuration and permissions.

How Contacts View Who they are Associated With:

When contacts are associated, an Associated Contacts section appears on their Contact Details page. This grid lists the names of contacts they can view and the type of access granted.

- **Training Associated Contacts:** Contacts can search for associated attendees, view training records and certificates, and register them for events and eLearning.



- **Custom Forms Associated Contacts:** Contacts can view form submissions submitted by their associated contacts.
- **Contact Details Associated Contacts:** Contacts can view (but not edit) contact details of their associated contacts.

⚠ Note: Associated Contacts are for visibility and reporting purposes only. They do not appear in an organization's staff list nor create system access automatically.

Create a Contact Image Library

Admins can create custom Contact questions that build an image library on the Contact Details page. The library can be set to **private** (staff-only) or **public**, depending on visibility settings.

This feature is commonly used for facility photos, program logos, or staff images that display in the **Public Directory**.

👤 Video Tutorial: Learn how to add images to Contact Details and display them in the Public Directory. <https://www.loom.com/share/3584ecc115c44234a66d906faaf94692>

Contact IDs

Each Contact record includes a unique Contact ID, which can also serve as a Membership ID, if desired.

The Contact ID appears:

- In the leftmost column of search results in the **Contact Directory**
- In the **Basic Information** section of the Contact Details page
- In the **URL** when viewing that specific Contact record

This ID remains the same throughout the system and can be used for reporting, imports, or data matching.

Updating Emails with Linked Profiles

When an email address is updated for a Contact or Contact Staff, the system checks for matching addresses in their **Training & Events** or **Donor** profiles. Maintaining consistent email addresses ensures all records remain linked under a single profile.

After saving the new email address, a prompt appears asking whether to apply the change to any linked profiles. Select one or more profiles to update the information across your system.

Once confirmed, the system automatically updates the selected profiles. If the change is made by the user, the system will **log** them out for security, and they must log back in using the new email address.

👤 Video Tutorial: Learn how to update your email address and apply the change across linked Contact, Training, and Donor profiles.

<https://www.loom.com/share/405a6b3a12164ca4abac000cae685fa>



Contact Directory

The Contact Directory provides a searchable and exportable list of all active and expired contacts. Use filters to locate specific organizations or individuals, generate mailing lists, and create summary reports.

Directory search results can be used to send emails or text messages, and exported to Excel, PDF, email marketing lists, access groups/committees, or listservs.

 **Video Tutorial:** Learn how to use the Contact Directory to search, filter, and export contact data. <https://www.loom.com/share/ffb1d65c2b1f4857ad07735453509c5a>

Search and Filter in the Contact Directory

Use the filter options to search for specific contacts or organizations within the Contact Directory. If no parameters are selected, all active Contacts will display in the results

- **Include Expired Contacts:** Check this box to include contacts with expired or lapsed membership dates in your results.
 -  **Video Tutorial:** Learn how to search for expired contacts using advanced filters. <https://www.loom.com/share/d5b03b6a4fa84045b0bb599f774dafbe>
 -  **Tip:** Display expiration dates by adding an **Expiration Date** column to the Contact grid or by viewing them in the **Summary Section** below the grid.
-  **Note:** If **Contact Custom Questions** were created and set as filterable fields, they will appear as additional filter options.

Generate Summary Reports from the Contact Directory:

- **Contacts:** Displays all contacts included in the search results. Each row represents either an individual or organizational contact. For organizational contacts, the email address shown in the grid is the primary contact person.
- **Staff:** Displays all Contact Staff at the organizations included in the search results.
- **Contact Type Summary:** Shows a total count of each Contact Type in the search results.
- **Additional Details:** Displays compiled counts and data by Contact for Additional Information fields. Field names and values may vary based on your site's configuration.
 - Fields that can display here:
 - Board of Directors
 - Staff Members
 - Volunteers
 - Transitional Housing (TH) Beds
 - Shelter Beds
 - Shelter Bedrooms
- **Contact Expiration:** Lists each Contact and their expiration date.
- **Contact Mailing Labels:** Displays all contacts marked **Is Receiving Paper Mailing** in their Contact Address section. Only contacts with complete mailing addresses appear in this report. The system generates a preformatted label sheet ready to print using a standard label template.
 -  **Video Tutorial:** View how to generate and print mailing labels. <https://www.loom.com/share/d67fe41e1df04ed99a2666bda6e7ffb3>
- **Addresses:** Lists each contact, address, and primary email address.
- **Mailing List:** Displays all mailing lists and the contacts included in each list.
- **Program Types:** Sorts contacts by Program Type with total counts.



- **Regions:** Sorts contacts by Region with total counts.
- **Counties:** Sorts contacts by County with total counts.
- **Program Services:** Sorts contacts by Program Service categories.
- **Program Languages:** Sorts contacts by Language Services Provided.
- **Custom Contact Fields:** Displays summary data for custom contact fields created in System Configuration.
 - Questions must have the checkbox Display in Summary? selected for it to appear in this section.

Perform Bulk Actions from the Contact Directory:

Once your filtered results display, several actions are available in the Contact Directory.

Contacts Grid: For Contacts that are Organizations, bulk actions taken from the Contacts grid in Directory Search results apply to the organization's **primary contact**.

Staff Grid: For Contacts that are Organizations with staff listed in their profile, all staff will be listed in the Staff grid in Directory Search results. Actions taken from the Staff grid apply to **all staff members** listed within those filtered search parameters.

- **Print:** Expand all sections and click Print to open your print dialog box. This will print only visible sections of your filtered results. For a more complete printout, export the grids and print from the exported file..
- **Export to Excel or PDF:** Export the current grid view for recordkeeping or offline reporting. (You can add and remove columns, group by columns, etc. The export will be exactly how the grid is organized.)
- **Export Emails as a Group:** Creates a one-time mailing list in your connected Email Marketing System (EMS). The exported list exists only in the EMS and does not sync back to Coalition Manager or update automatically.
 - **⚠ Note:** Exporting to an existing list will completely replace that list. Any filters applied to the grid are not honored, the export includes all records in the grid, not just filtered results.
 - **👤 Video Tutorial:** Learn how to export contact and staff emails to your connected EMS for one-time campaigns.
<https://www.loom.com/share/582e25db92b64ea7b10a910b54a6cbe5>
- **Add to Mailing Lists:** Adds contacts or staff from the grid to one or more existing mailing lists. These lists are created in **System Configuration** and are used for ongoing, regularly updated communications.
 - **⚠ Note:** You must select an existing mailing list. All records in the grid are added to the list if they are not already included. This action does not remove or override existing list members. Grid filters are not honored—the action includes all records in the grid, not only filtered results.
 - **👤 Video Tutorial:** Learn how to add contacts or staff to existing mailing lists.
<https://www.loom.com/share/582e25db92b64ea7b10a910b54a6cbe5>
 - **💡 Tip:** Use **Add to Mailing Lists** for ongoing communication lists, and **Export to EMS** for one-time messages or event announcements.
- **★ Add to Listserv:** Add selected email addresses to one or more **Listservs** by selecting them from the dropdown.
- **Email Group:** This option allows you to create and send an email to the selected email addresses through your computer's default email program (Outlook, Gmail, Apple Mail, etc.).
 - You may continue filtering your list in the grid before sending. When ready, click **Email Group**.
 - Your default email application will open with a new message draft.



- All selected email addresses are automatically placed in the **BCC** field so the message can be sent to everyone at once.
- If your email system has a sending limit, a **Copy All** option will appear to copy addresses into your system.
- This option *does not* add contacts to any mailing list in your EMS.
- Best used for small, informal, or direct outreach.
-  **Video Tutorial:** Learn how to email filtered contact groups using your default email system. <https://www.loom.com/share/fb3d03715f334e18a2a3ea122b07c412>
- **Add to Access Group or Committee:** Select from the dropdown list to add selected contacts directly to an Access Group or Committee.
 -  **Video Tutorial:** View how to add contacts to Access Groups or Committees. <https://www.loom.com/share/679e8b9bdf8b4b138ee02367ffd1474e>
 -  **Note:** If you add committee members from the Contact Directory, you must update Committee Member details such as **Position** and **Term Start/End Dates** directly in the Contact Manager > Access Groups/Committees section after adding.
-  **Text Message:** Select **Text Message** to send an SMS to any phone number that has opted in to receive text messages.
 - From the **Contacts** grid: Sends to the organization's main phone number (if marked Text Opt-In).
 - From the **Staff** grid: Sends to individual staff phone numbers marked Text Opt-In.
 - Enter your message in the **Body** field, then review and confirm before sending.
 -  **Note:** Text messages send to anyone in the grid who opted into text messaging. Grid filters are not honored, the message sends to all records in the grid, not only filtered results.
 -  **Video Tutorial:** View how to send text messages through Coalition Manager: <https://www.loom.com/share/ce31ffe7a76b4a548063ce1974328d7c>

Coalition Staff

Manage staff for your Organization in this section. Adding your staff in this area, instead of as a Contact, ensures they have access and permissions with the correct "Role". Coalition staff listed here can create and manage trainings, add billed entries, run reports, create forms, upload resources, etc.

Active and Archived staff appear under separate tabs. Archive staff when they leave your organization so they no longer have login access. Their records and history remain preserved even after archive.

Edit staff profiles to assign module-level access, link supervisors, add or remove access groups, set default funding sources, and update other permissions.

 **Video Tutorial:** Learn how to add staff who work at your coalition or network to give them Coalition Manager access. <https://www.loom.com/share/5b58dcdef803423798f77c850e109c20>

Coalition Admin vs. Coalition Staff Access Levels

Coalition Admins control system-wide configurations and user permissions;
Coalition Staff focus on operational data entry and program management.

 **Tip:** All new staff added under your staff section automatically default to the role of **Coalition Staff** access. Current Coalition Admins, or CM Support staff can upgrade Coalition Staff to Coalition



Admins from the **Users List**.

When your site was first deployed, at least one person at your organization was assigned as an **Coalition Admin**. This person serves as the primary system administrator for your Coalition Manager site.

Coalition Admins have administrative control and can:

- Access and edit modules settings in **System Configuration**.
- Manage dropdown lists, menu items, and module labels.
- Add or remove funding sources, assign staff allocations, and set PTO accrual rates.
- Create and update **Contact Types**
- View and approve **Time Reports, Time Off Requests, and financial configurations**.
- Import bulk contact lists.

Coalition Staff have limited internal access and can:

- Enter data, upload information, and manage daily operations in all modules (TA, PA, Trainings, Resources, etc.).
- Access assigned modules based on permissions set by an Admin.
- Submit time entries, run reports on all data entered by any staff or contact in the system, and export data.

⚠ Note: System access levels must be changed in **Contact Manager > Users List**, not in the Coalition Staff section.

Staff Grid Actions: From the Staff Grid you can:

- **Edit:** Update staff information, including email address and phone number details.
- **Archive:** Archive staff who are no longer active or employed. Archiving removes system access but retains historical data.
- **Funding Source Allocations:** Click the **\$ (Dollar Sign)** icon to view and manage a staff member's Funding Source Grid. From here, you can view current and past allocations, filter by year or grant, export to Excel or PDF, and add new funding sources.
 - Accurate funding allocations ensure reports and time entries reflect correct grant percentages. Regularly review allocations at the start of each funding period.
 - Only your Admins can view and edit allocations; the icon is hidden from non-admin staff.
 - **Add or Edit Funding Sources:**
 - Click **Add Sources** to add a New Funding Source
 - Click **+Add Grant Source**
 - **Funding Grant Source:** Choose the appropriate funding source from the dropdown.
 - **Year:** Select the year associated with the following months that will be selected for this allocation.
 - **Month:** Choose one or more months where this staff member's time will be attributed to the selected funding source.
 - **Max Hour Limit:**
 - Enter 0 to allow unlimited hours or have no target hours.
 - Enter a number to set a monthly target for billing hours.
 - When staff enter billed time in PA, TA, or Training entries, they will see progress toward the monthly target (for example: *50% of 40 hours reached*).



- By default, billed hours can go over the max limits. However, if restrictions are enforced, users cannot enter hours beyond the limit.
 -  Contact CM Support to enable the hour restriction feature.
-  **Note:** The Max Hour Limit should be based on the number of hours a staff member can work in a month. Some organizations calculate this using total working days per month, while others use an annual average (e.g., 52 weeks × 40 hours ÷ 12 months).
- Click **+Add Grant Source**, to add an additional grant, or enter information for a different year.

Export Staff Emails as a Group

Coalition Admins can export all staff email addresses as a group to the connected **Email Marketing System (EMS)**.

- Click **Export Staff Emails as a Group**.
- Enter a **Group Name**.
 - Begin typing to select an existing group list, or enter a new name to create one.
- Click **Export**.
-  **Video Tutorial:** Learn how to export staff email addresses to a group or one-time mailing list. <https://www.loom.com/share/8cfc16ec6d744c4ebaed0ca2330fc35f>

 **Note:** The export syncs only with the email marketing system connected to your Coalition Manager site (e.g., MailJet).

Create a New Coalition Staff Account

- Click **Add New**.
- **Name details:** Prefix, First, Middle, Last, Pronouns (*First and Last Name are required*)
- **Organization Team:** Select a team from the dropdown. (Optional)
 - Teams are created in **System Configuration** and used for reporting across multi-person teams.
- **Email Address** (required):
 - The email is the **unique identifier** in CM and can only be used once.
 - Each email is unique and connects all records for the staff member (Trainings, TA, PA, Resources, Time Records).
 - Once saved, the staff member automatically receives a welcome email to set up their password.
- **Job Title** (required field)
- **Hire Date and Termination Date:** Enter hire and/or end dates.
 - These dates do not control system access but support compliance and certification tracking.
 -  **If the Training Compliance feature is enabled**, tracking is based on the hire date.
-  **Listserv:** If enabled, select one or more listservs to add the staff member.
- **Default Funding/Grant Source:** Select the funding source to auto-populate in TA, PA, and Training modules for the staff member.
 - Other funding sources remain in the dropdown as options, depending on allocations and funding visibility.
- **Modules Associated:** Select the modules this staff member can access.
 - Leave blank to grant access to all available modules.
- **Mailing Lists:** Choose applicable mailing lists.
-  **Supervisor(s):** Select one or more supervisors (optional). When enabled, listed supervisors receive email notifications for submitted timesheets and leave requests, and any one of them can approve or reject the submission.



-  **Add PTO:** If your site has **PTO Accruals** enabled, CM Admins can configure accrual rates for this staff member using Add PTO.
 - Accrual rate options vary by setup.
 - More details are available in the **System Configuration Manual**.
- **Add Address and/or Phone Numbers:** Add multiple addresses and phone numbers as needed.
- **Notes:** Enter internal notes or staff bios (*visible only to site staff*).

Once saved, the staff member will appear in the **Active Staff** tab and receive an automated welcome email to create their login credentials.

Contacts List

The **Contacts List** displays all organizational and individual Contacts, past and present, along with staff at Contact Organizations.

From this section, new Contacts can be added individually, pending public requests can be reviewed, and Coalition Admins can bulk import Contacts, if enabled.

 **Video Tutorial:** Learn how to view, filter, and manage Contacts in the Contacts List.
<https://www.loom.com/share/766280bcdb9541a1a3adb658d1d5e4fc>

Contacts and Contact Staff are organized under multiple tabs including:

- **Active:** Displays current Contacts and Contact Organizations that have no expiration date, have not expired, and are not archived.
- **Expired:** Shows Contacts and Contact organizations whose expiration date has passed.
- **Archived:** Displays Contacts and Contact organizations that have been archived. This is often used for former members or organizations that no longer exist.
- **Pending:** Lists public applicants, organizations, or individuals requesting to join via the **Join Us** page.
 - Your Staff can review details, then approve or deny access.
 - Once approved, the Contact moves to the **Active** tab and, if applicable, receives login credentials.
 -  **Video Tutorial:** Learn how to review and approve pending Contacts submitted from the Join Us page.
<https://www.loom.com/share/dad19a036c424323aa817c0d72300adb>
- **Denied:** Shows contacts that were denied.
 - Staff must enter a **Reason for Denial**, which triggers an automatic email to the applicant explaining why their request was denied. (i.e. *Not appropriate for membership, Already listed as staff of a member organization, Should be added by their program administrator*).
 -  **Video Tutorial:** Learn how to deny pending Contacts and send automated notifications. <https://www.loom.com/share/a8a0bbb6f43c499da969b63d092c1fc3>
- **Active Staff:** Lists all current staff members at Contact Organizations.
 - Staff in this list also appear in each organization's **Contact Details** page.
- **Pending Staff:** Displays individuals who requested staff access to a Contact Organization through the Join Us page.
 - Requests can be approved or denied from this tab. They can also be reviewed by clicking the notification email sent to Coalition Staff and/or Contact Admins, depending on your setup.



- **Approved Staff** move automatically to the **Active Staff** tab and receive setup emails for Coalition Manager access.
- **Denied staff** remain listed under the **Denied** tab for recordkeeping or future review.
 - When a join request is denied, a **Reason for Denial** must be entered, and the system emails the individual with that reason.
- **⚠ Note:** Approved Contacts automatically receive welcome messages prompting them to confirm their email and set up a Coalition Manager password, if their Contact Type includes system access.

Add New Contact

New Contacts can be added directly from the Contacts List using the **Add New** button.

- Coalition Admins can also bulk import Contacts by clicking **Import Contacts**.

Contact Staff Approval Notification Email

When this feature is enabled, the **Approval Notification Email** field appears in the **Contact Additional Information** section of each organization's profile.

This allows organizations to enter one or more designated email addresses that will automatically receive approval notifications whenever a **Contact Staff** approval is submitted through the **Join Us** page.

If no email is entered in this section, approval notifications are sent to the Coalition's designated staff.

🎥 Video Tutorial: View how to configure and use the Approval Notification Email field to automate staff approval notifications: <https://www.loom.com/share/21930f5eaf1745f792e0c658b2fbf177>

Upload Multiple Contacts

Import Contacts: Coalition Admins can bulk-import Contacts and Contact Organizations through. Imports are processed **Contact Type by Contact Type**.

- **Download a new template** each time you import.
- **Use a separate Excel file** for each Contact Type.
- **Enter data:**
 - If the Contact is an **organization**, enter details for the **primary staff person** (usually the Executive Director).
 - If the Contact is an **individual**, enter their personal information.
 - **Required fields:** Email, First Name, Last Name
 - **Organizational Name:** This is helpful information if this is an Organizational Contact: Required if you want to add staff to the organization later
 - **Phone Numbers:** Multiple allowed, but only the first can include an extension
- **Do not edit the template:**
 - Do not delete rows or columns
 - Keep the same font and size
 - Template formatting changes will cause import errors
 - Save the file to your computer.
- **Import the file:**
 - Click **Import**, select the file from your device
 - Choose the appropriate address location and any mailing lists



- Select the appropriate expiration date, if different from the one in System Configuration
- Click **Import**
- **Confirm success:** A notice will appear when the import is successful.
- **Verify:** Go to the **Contact Details page** to confirm that the Contacts werewas added correctly.

 **Video Tutorial:** View how to Bulk Import Contacts:
<https://www.loom.com/share/12c3d96c13f74b3e973431d9940e0cc4>

Users List

The Users List displays everyone with login access to Coalition Manager. Not all Contacts are users, system access depends on the Contact Type. Users can include contacts, donors, and your staff.

A Contact/Contact Staff becomes a user when their Contact Type is designated with system access in System Configuration. When their profile is created, they receive an automated Welcome Email prompting them to set up a password. Once confirmed, they appear in the Users List.

This grid allows Coalition Staff to manage user accounts, confirm login details, reset passwords, update roles, and monitor account access.

From this grid, you can:

- View all users with Coalition Manager access.
- Confirm email, account, and two-factor authentication status.
- Reset passwords or unlock accounts.
- Update Coalition Staff roles and permissions.
- Monitor lockouts, login attempts, and last login dates.

 **Note:** Updates to a user's name, job title, or email address must be made in their Contact Details, not in the Users List.

 **Note:** Only your Coalition Staff should be given the access level Coalition Staff or Coalition Admin.

 **Note:** Only users with Coalition Manager login access appear in this list.

 **Video Tutorial:** Learn how to reset passwords, update roles, and manage account access in the Users List. <https://www.loom.com/share/1b160708d7f34d59a2a0153b7c80aaa5>

User Grid Overview: Use the **three dots** icon to add or rearrange columns.

- **Email:** The user's login email (username).
- **Role:** Displays assigned access level (Admin, Coalition Staff, Donor or User).
- **Email Confirmed?:** Shows if the user validated their account.
- **Display Name:** The user's name, as displayed throughout the system.
- **Phone Number / Phone Number Confirmed?:** Displays whether a phone number was added under **My Account** and successfully confirmed. Phone numbers are confirmed by entering the authentication code sent by text message.
 -  **Note:** This phone number is separate from any phone numbers entered in **Contact Details**.
- **Lockout Enabled?:** Indicates if login lockout protection is active.
- **Two Factor Enabled?:** Shows whether 2FA (two factor authentication) is enabled by the user.



- **Access Failed Count:** Tracks failed login attempts. This will reset when successfully logged in again or after 10 minutes of inactivity.
- **Last Password Changed Date:** Displays when the password was last updated.
- **Last Logged In Date:** Shows the last time the user entered their password to log in.
- **Locked Out End Time:** Displays when a temporary lockout expires.

Tip: Archive inactive users from the **Contact Staff Listing** instead of removing them from the **Users List**. Removing a Contact completely also removes all associated user access and history.

User Grid Icons

	Access Info	View key user details, including role, email and confirmation status, phone number, two-factor authentication (2FA) status, failed login attempts, and lockout settings.
	Contact Details	Opens the Contact Details page if the user is a Contact or staff member of a Contact Organization. From there, you can edit the staff record (e.g., job title, email, or name).
	Edit	Opens the user's account for manual updates. Use this option to confirm email and phone number, turn off/on the lockout feature, or turn off/on 2FA . The Lockout Enabled box is checked by default to prevent logins after multiple failed attempts. It is not recommended to disable this feature, as it helps protect your site from spam or unauthorized access.
	Reset Password	Allows Coalition Staff to manually reset a password if the user cannot do it themselves. <ul style="list-style-type: none"> • Click Edit next to the user's name. • Click the Key (Reset Password) icon. • Enter a temporary password and click Save. <p>⚠ Note: It's recommended that Users reset their own passwords using Forgot Password on the login page or update it later under Account Settings.</p>
	Reset Role	Available to Admins only . Used to change a user's access level (e.g., from <i>Contact Staff</i> to <i>Contact Admin</i>). Common Roles: <ul style="list-style-type: none"> • Admin: Full administrative permissions and approvals. • Organization Staff: Manage operations and data. • User: Member access for trainings, forms, and resources.
	Resend Email	Appears if the user has not validated their account. Sends the Welcome Email again to restart validation and password setup. If the icon is not visible, the user's access is already active. Users can reset their password anytime via Forgot Password on the login page.
	Unlock Account	An unlock icon appears when a user is locked out after too many failed login attempts. Click the unlock icon to immediately unlock the account.



		After five failed attempts the user will see a pop up that says: "This account has been locked out, please try again later."
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Access Groups/Committees

Access Groups and Committees control who can view or interact with specific features such as trainings, custom forms, event registrations, and resources.

Only members within a selected Access Group or Committee can access the items those groups are assigned to.

Examples of Access Groups/Committees might include Executive Directors, Volunteer Coordinators, Board Members, Prevention Staff, or Multidisciplinary Team Members.

Access Groups vs Committees

Committees function similarly to Access Groups, both allow you to control permissions for specific members and restrict access to certain areas.

Both Access Groups and Committees can be applied to trainings, resources, and custom forms to ensure that only designated members can register, view, or submit certain items.

Committee Extra Features:

- **Positions & Terms:** Track member roles (e.g., Chair, Coordinator) and add defined start/end dates
- **Notes:** Record relevant information about a member's service or participation.
- **Committee History:** View both current and past memberships for each contact.

 **Video Tutorial:** Learn how to create and manage committees, add members and positions, and control access to trainings, resources, and forms.

<https://www.loom.com/share/1112d9800ab0404a9c7a654d552260fc>

Create an Access Group/Committee

- Click **Add New**
- **Group Title:** Enter a title for the Access Group/Committee
- **Is this Group a Committee?** Check this box if the group will track positions or terms.
 - If checked, additional fields appear to associate with a specific Contact Staff member:
 - **Committee Position:** Select the position for this member.
 - **Term Start and End Date:** Enter the member's start and end dates. Committee Members will automatically roll on/off the group depending on these dates.
 - **Notes:** Add any relevant details about the member's term or role.
- Click **Add Contact:**
 - **Contact Access:**
 - Selecting only a **Contact Type** grants access to *all contacts* of that type.
 - Selecting a **Contact** grants access to *all staff* under that organization.
 - Selecting specific **Contact Staff** limits access to those individuals only.
- **Coalition Staff Access:** Only select Coalition Staff if you want to hide the resources shared to this access group/committee to Coalition Staff. Selecting no Coalition Staff means that



anyone on your staff can see the resources shared with this group and make further edits to the Access Group/Committee. To restrict a resource to certain staff, at least one staff member must be added to the Access Group.

-  **Note:** Selecting Coalition Staff here applies **only** to Resource Manager visibility. This feature does not limit access to trainings or custom forms.
-  **Video Tutorial:** Learn how to limit access to resources to specific coalition staff using Access Groups or Committees.
<https://www.loom.com/share/679e8b9bdf8b4b138ee02367ffd1474e>

Additional Methods to Add Contacts to Access Groups/Committees

In addition to adding members directly within the Access Groups/Committees grid, you can add contacts to Access Groups/Committees individually from their profile or add in bulk to Access Groups using the Contact Directory.

Individually Add a Contact(s) in Contact Details to an Access Group or Committee

- Go to a **Contact Staff** or **Individual Contact** record.
- Click **Edit Details**.
- **Access Groups:** Select one or more Access Groups from the dropdown list. Or select one or more **Access Groups/Committees** from the dropdown list.
 - Text below the selection area shows if the contact is already part of an Access Group through their Contact Type by default.
- **Add Committee Group:**
 - **Committee Group:** Select a Committee from the dropdown list.
 - **Committee Position:** Select the position for this member.
 - **Term Start and End Date:** Enter the member's start and end dates.
 - **Notes:** Add any relevant details about the member's term or role.

Add Contacts to an Access Group via Contact Directory Export to Access Groups

- Select your desired filters in Contact Directory.
- Choose a grid from the results to add users to the Access Groups.
 - **Add Main Contacts:** To add main contacts, click the Add to Access Group.
 - **Add All Contact Staff:** To add all staff from those organizations, click the Add to Access Group button above the Staff List section.
 -  **Note:** Bulk add from the Contact Directory only works for Access Groups; you cannot use this method to add Contacts to Committees because each person needs to be assigned a role and activity dates. Add people to Committees one-by-one in the Contact/Staff details, or in Contact Manager > Access Group/Committees. .

 **Video Tutorial:** Learn how to add contacts or staff to Access Groups and Committees individually or in bulk using the Contact Directory.

<https://www.loom.com/share/679e8b9bdf8b4b138ee02367ffd1474e>

Campaigns

If your site uses **MailJet** for integrated email marketing, the **Campaigns** section in **Contact Manager** lets staff view, share, and export public links for published and draft campaigns directly from Coalition Manager, no need to log in to MailJet.

 **Video Tutorial:** Learn how to view and share MailJet campaigns directly from Coalition Manager.



<https://www.loom.com/share/29f4b8693d3d48e1b13e7eb3cc13d8f4>

Legacy Systems: Some long-term Coalition Manager clients may also see a **SendGrid Campaigns** tab. These are older campaigns created before MailJet integration and remain available for reference.

View and Share Campaigns

Campaigns display under two tabs:

- **Published:** Completed campaigns sent to contacts.
- **Draft:** Campaigns that are saved but not yet sent.

Actions:

- **View:** Opens the selected campaign in a new window.
- **Copy Link:** Copies the public campaign link for sharing via email, website, or social media.
- **Export:** Exports the campaign to PDF for recordkeeping or offline sharing.

Contact Additional Information

Coalition Staff can view aggregated, historical data for all member organizations in the compiled grid called **Contact Additional Information**.

Members and users can view their own data history within the **Additional Information** section of their individual Contact Details page.

The grid displays organization-level data collected during membership renewal or profile updates. Coalition Staff use it to review and compare member-reported information, such as **staffing numbers, budgets, or program details**, across multiple years.

Admins define which information is collected by configuring requirements for each Contact Type in **System Configuration > Contact Types > Additional Information**.

 **Video Tutorial:** Learn how to view and compare historical Additional Information data across years. <https://www.loom.com/share/262bed44c5e546f785435cd35b219c9b>

Features

- **Aggregated View:** Displays all organizations' Additional Information in a single compiled grid.
- **Historical Comparison:** Allows users and staff to compare data across years by selecting which years to display.
- **Renewal Integration:** During membership renewal, users verify and update these fields as required.
- **Status Filters:** Filter data by **Active, Expired, or Archived** status.
- **Custom Layouts:** Organize or group data by **Contact Type, year**, or other attributes, and save layouts for future reporting.
- **Export Options:** Export results to **Excel** or **PDF** for analysis or recordkeeping.

 **Tip:** Use this grid to identify trends across reporting years, such as shifts in staffing levels, budgets, or service areas. Saved layouts make it easy to produce consistent reports each renewal cycle.

 **Note:** The data shown in this grid is defined by Coalition Admins and mirrors the fields visible to members in their **Contact Details**. Any updates made in **System Configuration > Contact Type > Additional Information** automatically apply to this grid.



Member Renewal Management

This section explains how organizations renew memberships, verify details, and pay dues through Coalition Manager. Renewal, fee, and verification settings are configured by Coalition Admins in **System Configuration > Contact Types**.

Renewal with Membership Fee

When contact types require payment, members can renew and pay directly through their **Contact Details** page. Fees calculate automatically, and payment options vary by configuration.

Reminder Emails:

- **Recipients:** Reminder emails send automatically to:
 - The Primary/Main Contact
 - The address listed under the Contact's Additional Information > Payment Reminder Email (if applicable).
- Each reminder email includes a **direct payment link** for quick renewal.
- **Default Schedule:** (All sent at **7:00 AM CST**)
 - 30, 10, 7, 3, and 1 day before expiration
 - 1 day and 10 days after expiration
-  Contact CM Support Staff to customize reminder email content or timing.

Renewal Button: The **Renew** button displays at the top of the **Contact Details** page.

- Members click **Renew** to complete the renewal process or submit a payment installment when on a payment plan.

Membership Fee Calculation:

- **Calculated Membership Fees:** If fees are based on organization budget or staff count, the system calculates the correct amount once the member enters the required data.
- **Custom Membership Fees:** Coalition Staff may manually update a membership fee in **Additional Contact Details** when needed.

Payment Types:

-  **Online Payment (Credit Card):** Payments process through your connected payment processor (e.g., **Stripe, PayPal**).
 - If transaction fees are enabled, they display automatically when Credit Card is selected.
 -  **Video Tutorial:** View the user experience for online credit card payments.
<https://www.loom.com/share/9683ad9d13794c50abdb8075ad19b393>
-  **Online Payment (ACH Bank Transfer, if enabled):** If enabled, members can pay via secure bank draft. ACH does not charge a processing fee.
 -  **Video Tutorial:** Learn how members pay via ACH Bank Transfer.
<https://www.loom.com/share/802f8e0cb2414805ab382dd95e060c5c>
- **Offline Payments: Pay by Check:** Members who prefer to mail a check should still complete their renewal information online. Best Practice is to follow this process:
 - **Member Selects Pay by Check:** Members follow the same renewal steps as online payments, click **Renew**, complete required fields, and accept the Membership Agreement (if shown).
 - Choose **Send Pay by Check** on the payment page.



- **Coalition Staff is Alerted:** Coalition Staff listed under **Site Specific Info > Contact Management Updates** receive an automated notification that a check is expected.
- **Coalition Staff Confirms Payment Received:** When the check arrives, staff confirm payment from the Contact Details page.
 - **Confirm Payment Received:**
 - Click the confirmation button in the notification email, **or**
 - Go to **Contact Details**, then click the ✓ **Payment Log** checkmark icon at the bottom of the page.
 - ⚠ **Note:** Do **not** click **Offline Payment** at the top of the page if a pending “Pay by Check” record already exists. This will create a duplicate payment entry.
 - 🎥 **Video Tutorial:** Learn how members submit membership payments by check. <https://www.loom.com/share/c3933f5cbee04659b67d1e2eb034f7c5>
 - 🎥 **Video Tutorial:** Learn how to mManage offline membership payments such as: confirming checks and, handling partial payments, and renew renewals. <https://www.loom.com/share/fc307161f41f4bb78492e1415553b2a6>
 - 🔧 Contact the CM Support team to enable/disable Offline Payments by check.

Use Offline Payment to Record Payments Not Linked to a Renewal

Use **Offline Payment** when a payment is received but the contact did **not** complete the renewal process.

- Go to **Contact Details > Basic Information > Offline Payment**.
- Enter the payment details, verify the expiration date and click **Submit**.
- If the contact paid only part of their total dues amount:
 - Select **“Yes”** for Would you like to update payment due date?
 - Choose the next installment date.
 - A payment reminder email is sent automatically as the due date approaches.
- The payment will appear in the Payment Log, and the organization’s expiration date updates automatically, unless manually changed.

⚠ **Note:** Verification fields required during a standard renewal are **not** completed when payment is entered through Offline Payment.

Expired Accounts with Restricted Access

When a **Contact Type** is configured to restrict access after expiration, members can still log in, but they lose access to member-only modules such as **Trainings, Resources, or Custom Forms** until renewal is completed.

- If an expired member attempts to open a restricted area, a message appears prompting them to renew.
- To regain access, they must go to **Contact > Details > Renew or Verify** and complete the renewal process.

Membership Invoices

Each membership invoice includes a unique invoice number, displayed at the bottom of the invoice document. The same number appears in the member’s Payment Log once payment is received.



For annual memberships, the invoice number often includes the membership year (for example, an invoice ending in “2027” indicates coverage through 2027).

Download Membership Invoices

- **Members:** When logged in, members can view and download invoices for membership renewals from their dashboard or Contact Details page.
- **⚠ Note:** If membership payment is based on a sliding scale of budget or number of staff, that information must be updated first for the invoice to reflect the correct amount.
- If membership fees are calculated using a sliding scale based on budget or staff count, those fields need to be updated first for the invoice to reflect the correct amount.
 - **👤 Video Tutorial:** Learn how members can view and download invoices.
<https://www.loom.com/share/b587f7649a364fee90560756516b2c28>
- **Coalition Staff:** Staff can view or download invoices directly from the **Contact Details** page.
 - **👤 Video Tutorial:** Learn how Coalition Staff access invoices.
<https://www.loom.com/share/bc48e01faf654f05ac6a275cc312ff5a>

No Fee/Annual Verification Renewal

When a contact membership type has no fee but includes an expiration date, contacts members will be prompted each year to verify and update their contact information.

- Expired contacts receive automated email reminders with a direct link to verify their information.
- During verification, they confirm or update required fields such as **Staff List, Addresses, or Phone Numbers** to keep records current.
- Required fields are configured under **System Configuration > Contact Type**.

Reminder Emails: The *Membership Annual Update with No Fee Renewal* email is sent automatically to the Primary/Main Contact.

- **Default Schedule:** (All sent at **7:00 AM CST**)
 - Before expiration: 30 days, 10 days, 7 days, 3 days, and 1 day prior
 - After expiration: 1 day and 10 days after
- **🔧** Both email content and sending intervals can be customized, contact CM Support Staff to adjust.

Verify Button: The **Verify** button appears on an organization's **Contact Details** page when the Contact Type includes an expiration date but no membership fee.

- It becomes visible 30 days before expiration and remains visible until verification is completed.
- Members click **Verify** to review and confirm required sections. Once submitted, the expiration date automatically extends one year.
- **👤 Video Tutorial:** View the yearly no-fee renewal process from the member's perspective.
<https://www.loom.com/share/9710adbd38ad4486b84ab47860e52f6b>



Technical Assistance Module

Use the Technical Assistance (TA) Module to record and track technical or capacity-building assistance provided to Contacts, Members, and the general public.

Information entered in the **Funding/Billing Source** section automatically appears in staff timesheets for accurate grant reporting.

The **TA Dashboard** displays:

- Overdue or pending TA entries
- Recently completed TA entries
- Shortcuts to add new entries, view data summaries, search reports, and open saved reports

This module helps your team document outreach, training support, and direct technical help efficiently across all programs.

 **Video Tutorial:** *Overview of the Technical Assistance dashboard and how to view, add, and search TA entries.* <https://www.loom.com/share/e4d9ce2bdc9f49b3afe3f5fa678ff6d2>

Use the Quick Contact Search Box

Use the **Quick Search** box to quickly find Technical Assistance (TA) entries by Program or Contact.

Type the Contact name in the search bar or click the arrow to select from the list.

Select Contact ▼

Results display all TA entries provided to that Contact.

If the Contact is part of an organization, results are grouped by individual staff within that organization.

You can also use Quick Search to quickly add new TA entries for the same Contact — the new entry window will automatically populate the selected Contact or Organization name.

 **Video Tutorial:** *Learn how to use the Quick Search field to find and add Technical Assistance entries by Contact or Organization.*

<https://www.loom.com/share/a6be63df3bd44d0eb68dfbdd21a743f>

New TA Entry

Create a TA Entry

Complete the available sections as needed. Your organization's setup may include some or all of the following:

- **Request Information:**



- **Date Requested:** Enter the date (and time if enabled) the TA was requested. This will autofill to the entry date but can be changed using the calendar or clock.
- **Receiving Staff:** Select the staff member who received the request. This autofills with the logged-in user's name but can be changed from the dropdown list.
- **🔧 Applicable Funding/Grant Sources:** (If enabled on your site) Select the funding source select the funding source that supports the entry.
 - Selections impact the following sections:
 - Content Area
 - Occupations
 - Custom Questions
 - **👤 Video Tutorial:** Learn how to assign and track funding sources for Technical Assistance entries. <https://www.loom.com/share/6775f1ff90f84338800c85d39dd831a8>
- **Funding/Billing Source:**
 - **Staff:** Select the staff member(s) who completed the TA. The logged-in user autofills by default but can be changed from the dropdown list.
 - **🔧 Program Category:** Select the relevant category if enabled.
 - **👤 Video Tutorial:** View how to configure and use Program Categories across TA, PA, and Training entries for program-level reporting and analysis.: <https://www.loom.com/share/3e95f79787e54ddbabb69c213c8e5c2b9>
 - **Billing Start Time:** If time is turned on for your site.
 - **Funding/Grant Source:** Select the funding source(s).
 - **Billed Hour:** Enter the amount of time spent providing assistance (in .25-hour/15-minute increments). This automatically populates the staff timesheet in Time Tracker.

💡 Tip: Click the green + symbol to add additional records if hours are split among multiple grants, days, or staff.

Timesheet Sync Information

Hours and funding entered in TA will automatically appear on the staff member's timesheet **only if the time report for the specified pay period has not yet been submitted.**

If the timesheet has already been submitted or approved, changes made in the Funding/Billing Source section will not update the timesheet.

👤 Video Tutorial: Learn what happens when editing billing information for submitted timesheets. <https://www.loom.com/share/5d60aabff91b412e97fe8a5c06fabf18>

- **Recipient Information:** There are three ways to enter recipient information:
 - **Manually Enter:** Type the information into the fields to provide details.
 - **Quick Search:** Organization Admins and Organization Staff can search the Contact List by **name, email, or organization.** Use **Quick Search** to select from existing Contacts.
 - Once selected, the **profile details will autofill** the Contact Type, Contact, Contact Staff, and Contact Information fields.
 - **👤 Video Tutorial:** Learn how to use Quick Search to find Contacts and auto-fill organization and staff details. <https://www.loom.com/share/c9588b9947254fb38cd33ea88fc5895e>
 - **Contact Type:** Select applicable Contact Type of recipient(s).
 - **Contact and Contact Staff:** After selecting a Contact Type, you may choose the specific Contact or Contact Staff.



- **Contact and Contact Staff:** After selecting a Contact Type, you may choose the specific Contact or Contact Staff. Information will autofill with primary details (can be edited if needed).
 - **Video Tutorial:** Learn how to select the appropriate Contact Type when entering recipient information.
<https://www.loom.com/share/af1c2c9b5c5948c8a538ec7c8d0e1450>

⚠ **Note:** Adding information to blank fields in this section does **not** update Contact Manager records. To make updates, go directly to the **Contact Module**.

⚠ **Note:** Technical Assistance (TA) entries do not need to be attributed to a Contact. Manually entered recipient details can still be found using **Report Search/Data Summary**.

- **Occupation/Discipline Information:** Select the occupation(s) of the recipient(s). Adjust the count if assistance was provided to more than one person.
- **Assistance Type Information:** Select type(s) and subtypes of assistance provided. Adjust the count if more than one.
- **Publication Used:** Select any publications distributed and enter the number distributed.
 - The Publication list is configured in **System Configuration > Project Activity**.
 - The same list is used in **PA, TA, and Training** entries.
 - Counts are combined across these activities in **Combined Reports**.
- **Report Status and Date Completed:**
 - By default, the report status is set to **Complete** with the current date filled in. You can change the date using the calendar if needed.
 - **Pending Status:** If more work or data entry is required, change the status to **Pending**. Pending entries appear in the **Pending Section** of the grid and on the **Dashboard**.
 - When an entry is **Pending**, you can assign it to staff using the **Awaiting Staff** field. The selected staff will receive a notification email with a link to the entry.
 - **Video Tutorial:** Learn how to manage pending, active, overdue, and archived Project Activities, including marking items complete and organizing your grid view.
<https://www.loom.com/share/8e67845039a54cbea8d33f8815a1f49d>
 - **Due Date:** Set a due date for the activity.
 - Staff listed in **Awaiting Staff** will automatically receive reminder emails **7 days** and **1 day** before it is due.
 - If the entry is not marked **Complete** by the due date, it will be flagged as **Overdue** on the Dashboard.
- **Fulfillment Methods Used:** Select the method(s) used to fulfill the TA request.
 - Add counts if you need to track volume (e.g., number of emails sent, site visits conducted).
 - Ensure your tracking aligns with how your grant reports require TAs to be counted.
- **Executive Summary:** Write a short summary of the TA here. This will populate on the Time Tracker Timesheet and the Time Report.
- **Notes:** Provide a description of the work performed. Include only details needed and relevant to the TA.
 - If editing, note that the record has been updated.
 - You can format text, add hyperlinks, or upload documents.
 - Notes are keyword-searchable in Advanced Search.
- **Technical Assistance Custom Sections:** Each Organization can create additional TA sections. System Administrators manage this in System Configuration.



Report Search/Data Summary

All Technical Assistance (TA) Entries can be searched using Report Search/Data Summary.

- Use **Quick Search** to run searches with previously saved filter criteria. Quick Search functions the same as clicking on **Saved Report**.
- By default, searches include only active configurations.
- Archived dropdown items appear only when **Include ALL Configurations** is selected.
 - You can find this option at the top of the **Report Search** page.

⚠ Note: Large data sets may take longer to load. Be patient when filtering thousands of records. You can print or export the report exactly as displayed once results load.

Search Option criteria include:

- **Report Duration:** Select a time period. If you select *Time Period*, enter a date range. Leaving this blank searches all entries.
- **Applicable Report Sections/Summaries:** Select specific sections if needed. No selection reports all sections.
- **Receiving Staff:** Staff member who first took the TA entry.
- **Organization Team:** Teams created in System Configuration and linked to staff in their Staff Details.
- **Contributing Staff:** Search staff who have assisted with TAs.
- **Funding Grant Source:** Funding/Grant sources used to provide the TA.
- **Contact Type:** Filter for TA received by specific Contact Types.
- **Contact:** Search by organization or individual in a Contact Type.
- **Contact Staff:** Someone listed as staff in a Contact Organization
- **Recipient:** Search for TA recipients not listed in Contacts by typing their name.
- **Email:** Search by email address to find all TA provided to that address.
- **State, Counties, Country, or Regions**
- **Program Type:** Filter by the Type of Programs that received the TA
- **Assistance Type:** Filter by type of TA provided.
- **Assistance Sub Type:** Subtypes display after a Type is selected (if used).
- **Occupation/Discipline:** Filter by the Occupations of TA recipients.
- **Publications Used:** Filter by which Publication (if any) was distributed in the TA.
- **Fulfillment Method:** Filter by how TA was provided.
- **Report Status and Awaiting Actions:** Search Pending or Complete TAs, and/or filter by staff with Pending (incomplete) entries.
- **Notes/Executive Summary:** Search keywords from notes to find specific TAs.
- **Technical Assistance Custom Fields:** Filter by custom fields created in System Configuration

Filter/Organize TA Search Results

Once your search criteria is chosen, click **Filter**. You can then organize results into the report format you need:

- **TA Reports:** Lists all individual TAs within the search criteria.
 - This grid can further be organized by adding additional columns.
- **Occupation:** Count of TA provided by occupation of recipient.
- **Occupation Assistance Type Information:** Count of TA by occupation and type of assistance.
- **Fulfillment Method:** Count of TA by fulfillment method.
- **Publication Used:** Total number of each publications distributed through TA.
- **TA Summary by Receiving Staff:** Count of TA provided by each staff member.
- **TA Summary by Awaiting Staff:** Number of pending TAs assigned to each staff member.
- **Assistance Type Information:** Count of TA by assistance type and subtype.



- **TA Summary by Coalition Staff:** The count of TA by Organization Staff.
- **TA Summary by Funding/Grant Source:** Count of TAs by Funding/Grant Source.
- **State Summary:** Count of TA by Recipient's State
- **Country Summary:** Count of TA by Recipient's Country
- **Regions Summary** (if turned on): Count of TA by Recipient's Region
- **Program Services and Program Types Summary:** Total of TA provided by program services or program types, connected to Contact Manager.
 -  **Video Tutorial:** Learn how to view Technical Assistance totals by Program Types and Program Services.
<https://www.loom.com/share/82305ac7bd544075b351aabd4ac19ba4>
 -  **Note:** To ensure accurate reporting, confirm that each organization's **Program Services** and **Program Types** are filled out in **Contact Manager**.
-  Video on how to Filter and Organize Results:
<https://www.loom.com/share/fa06c594178043b2944179e3981ce7c3>

Current TA Entries

This grid displays your organization's most recent TA activity. You can view the last 1,000 active, pending, and archived TA entries recorded in approximately the past six months.

Use the tabs across the top to switch between **Active**, **Pending**, **Archived**, and **Overdue** entries.

- **Active:** Displays completed or ongoing TA entries.
- **Pending:** Shows entries awaiting approval.
- **Archived:** Lists entries moved out of active tracking.
- **Overdue:** Flags entries that have passed their due date and need attention.

Each TA entry in the grid can be **viewed**, **edited**, **archived**, or **duplicated** directly from this page. Pending and overdue entries can also be **approved** from the grid by clicking the check mark.

 **Note:** To find TA entries older than six months, use **Report Search** to locate historical records.

 **Video Tutorial:** Learn how to view, edit, and manage TA entries using the Current TA Entries grid.
<https://www.loom.com/share/23a1d1a7b2ed48928c914efc7c022ff2>



Project Activity Module

The Project Activity (PA) Module is used to record progress toward project goals, grant deliverables, policy initiatives, strategic objectives, and other coalition goals. In addition to tracking activities, it can be used to fill out the timesheet in the Time Tracker Module.

- The **PA Dashboard** displays:
 - Overdue or pending PAs
 - Recently completed PAs
 - Shortcuts to add new entries, view data summaries, search reports, and open saved reports

Each PA entry records project details such as activity type (i.e. meetings, prevention work, research), staff involvement, and completion status. The module supports accurate documentation for reporting and grant compliance.

If your site uses the Time Tracker Module, billed hours entered in the Staff Involvement section of a PA entry automatically appear on staff timesheets.

 **Video Tutorial:** Learn how to navigate the Project Activity Dashboard and manage project entries. <https://www.loom.com/share/66cbf28bb2d2424e5d8dab0f0b382c>

New PA Entry

Create a PA Entry

Use **New PA Entry** to record a project, meeting, or task. Hours entered here automatically appear on staff timesheets if Time Tracker is enabled. Your site setup may include some or all of the following sections:

- **Report Basic Information:**
 - **Start Date / End Date:** Autofill with today's date. Adjust using the calendar or clock icons (if time is enabled)
 - **Reporting Staff:** Automatically fills with the logged-in staff name. Select a different staff member if entering on behalf of another user.
-  **Applicable Funding/Grant Sources:** (If enabled) Select the funding source tied to this entry. Selections impact what Projects and Custom Sections display.
 -  **Video Tutorial:** Learn how to assign and track funding sources for Technical Assistance entries. <https://www.loom.com/share/6775f1ff90f84338800c85d39dd831a8>
- **Staff Involvement:**
 - Click **Add Staff**
 - **Staff:** Select the staff member(s) who completed the PA.
 - The logged-in user autofills by default but can be changed from the dropdown list.
 -  **Program Category:** Select the relevant category if enabled.
 -  **Video Tutorial:** View how to configure and use Program Categories across TA, PA, and Training entries for program-level reporting and analysis.: <https://www.loom.com/share/3e95f79787e54ddbab69c213c8e5c2b9>
 - **Billing Start Time:** Select the date and time associated with the PA (if enabled).
 - **Funding Grant Source:** Select the funding source(s).



- **Billed Hour:** Enter the amount of time spent providing assistance (in .25-hour/15-minute increments). This automatically populates the staff timesheet in Time Tracker.

 **Tip:** Click the green + symbol to add additional rows, if hours are split among multiple grants, days, or staff.

Timesheet Sync Information

Hours and funding entered in PA will automatically appear on the staff member's timesheet **only if the time report for the specified pay period has not yet been submitted.**

If the timesheet has already been submitted or approved, changes made in the Funding/Billing Source section will not update the timesheet.

 **Video Tutorial:** Learn what happens when editing billing information for submitted timesheets. <https://www.loom.com/share/5d60aabff91b412e97fe8a5c06fabf18>

- **Project Information:** Records details about the project and related activities.
 - Click **Add Project**
 - **Project:** Select project, sub-project, and activity (if needed).
 - Multiple projects can be entered.
 - Sub-Projects and Activities update automatically based on the selected Project.
- **Report Status and Date Completed:**
 - **Completion Status:**
 - **Complete:** By default, the report status is set to Complete with the current date filled in.
 - You can change the date using the calendar, if needed.
 - **Pending:** Select when the activity or data entry is still in progress.
 - Pending entries appear in the Pending Section of the grid and on the Dashboard.
 - **Awaiting Staff:** Select additional staff responsible for updating or completing the entry.
 - Selected staff will receive an automated email with a direct link to the entry.
 - **Due Date:** Assign a due date. Staff listed in Awaiting Staff will receive reminder emails 7 days and 1 day before the due date.
 - If not marked *Complete* by the due date, the entry is flagged as *Overdue* on the Dashboard.
 -  **Video Tutorial:** Learn how to set report statuses, due dates, and automated reminders for pending entries. <https://www.loom.com/share/09b583604ed5476aac6a05d9dc840531>.
 - **Participants:** Provide details about participants connected with the activity. Provide details about participants connected with the activity. You can either select participants from the list or manually add names.
 -  **Note:** Names entered here do not create contacts, nor populate fields in Contact Manager.
 - Click **Add Contact Participants:** Select individuals or organizations from Contact Manager.
 - **Contact Type:** Select applicable Contact Type of participant(s).



- **Contact and Contact Staff:** After selecting a Contact Type, you may choose the specific Contact or Contact Staff.
 - **Participant Count:** Autofills to 1 and can be adjusted to reflect multiple participants.
 - Example: *Contact Type: Membership Organization – 10* indicates ten members were represented when individual names are not entered.
 - Click **Add Other Participants:** Manually enter names not listed in Contact Manager. Use this option to describe a group or attendees when specific details are unavailable in Contact Manager.
 - **Other Participant:** Enter information about additional participants.
 - **Participant Count:** Add a count if representing multiple individuals of the same type.
- **Occupation:**
 - Click **Add Occupation:** Select the occupation(s) represented by participants.
 - **Count:** Add a count if representing multiple individuals.
- **Publication Used:** Select any publications distributed and enter the quantity.
 - The Publication list is configured in **System Configuration > Project Activity**.
 - The same list is used in **PA, TA, and Training** entries.
 - Counts are combined across these activities in **Combined Reports**.
-  **Regions and Travel Information:**
 - **Regions:** Select the Regions(s) associated with this activity.
 - **Miles Traveled:** Enter mileage linked to this project activity.
- **Executive Summary:** Write a short summary of the activity. This information appears in Time Tracker timesheets and time reports.
- **Staff Notes:** Provide a description of the activity.
 - If editing, note that the record has been updated.
 - You can format text, add hyperlinks, or upload documents.
 - Notes are keyword-searchable in Advanced Search.
- **Project Activity Custom Sections:** Each organization can customize and add extra sections to the PA Module. These are created by system administrators in **System Configuration**.
-  **Video Tutorial:** Learn how to record and save a new Project Activity entry.
<https://www.loom.com/share/bcc6228d3d914fbd988856bcb5dc8bce>

Report Search/Data Summary

All Project Activity (PA) Entries can be searched using Report Search/Data Summary.

- Use **Quick Search** to run searches with previously saved filter criteria. Quick Search functions the same as clicking on **Saved Report**.
- By default, searches include only active configurations.
- Archived dropdown items appear only when **Include ALL Configurations** is selected.
 - You can find this option at the top of the **Report Search** page.

 **Note:** Large data sets may take longer to load. Be patient when filtering thousands of records. You can print or export the report exactly as displayed once results load.

Search Option criteria include:

- **Report Duration:** Select a time period. If you select *Time Period*, enter a date range. Leaving this blank searches all entries.
- **Applicable Report Sections/Summaries:** Select specific sections if needed. No selection reports all sections.
- **Reporting Staff:** Staff who entered the PA entry.



- **Staff Involved:** Any staff with billed time associated with an entry.
- **Funding Grant Source:** Filter by the funding source or grant supporting the PA.
- **Project, Sub-Project, Activities:** Search by any project, subproject, or activity recorded in PA reports.
- **Report Status:**
- **Contact Type:** Filter by Contact Type associated with the PA.
- **Contact:** Search by specific Contact organization or individual
- **Contact Staff:** Filter by organization staff..
- **Others:** Search for participants entered manually.
- **Occupation:** Search by participant occupation.
- **Publications Used:** Filter by publications recorded or distributed during the activity.
- **Region:** Filter by region selected in the PA entry.
- **Executive Summary Keywords:** Search for entries with specific notes or words.
- **Staff Notes Keywords:** Search for entries with specific notes or words.
- **Project Activity Custom Fields:** Filter by any Custom Question set to be a filterable item.

Filter/Organize PA Search Results

Once your search criteria is chosen, click **Filter**. You can then organize results into the report format you need:

Report Views Available:

- **PA Reports:** Displays all individual PA entries that match your criteria.
- **PA Report Sub Project:** Shows total count of PAs by subproject.
- **PA Reports Activity:** Displays total count of PAs by activity.
- **PA Summary by Publication Used:** Shows total count of publications used or distributed.
- **PA Reports by Staff:** Lists total PA entry counts completed by each staff member.
- **PA Summary by Organization Staff:** Summarizes counts by staff, including hours and funding source breakdown.
- **PA Summary by Funding / Grant Source:** Displays totals of PAs linked to each funding source.
- **Occupation:** Displays totals PAs linked to each occupation.
- **Project Activity Custom Fields:** Any custom fields created by System Admins set to Display in Summary.

 **Video Tutorial:** How to Filter and Organize Results:

<https://www.loom.com/share/fa06c594178043b2944179e3981ce7c3>

Current PA Entries

This grid displays your organization's most recent Project Activity entries—up to the last 1,000 Active, Pending, Archived, and Overdue entries within roughly six months.

Use the tabs across the top to switch between views:

- **Active:** Completed or ongoing entries.
- **Pending:** Entries awaiting approval or completion.
- **Overdue:** Past-due entries flagged for follow-up.
- **Archived:** Entries no longer active but retained for records.

Each PA entry in the grid can be **viewed**, **edited**, **archived**, or **duplicated** directly from this page. Pending and overdue entries can be **approved** or **removed** using the grid icons.



⚠ Note: Archiving does not delete a Project Activity. Archived items are hidden from regular searches but remain available in possible reports.

⚠ Note: To find PA entries older than six months, use **Report Search** to locate historical records.

👤 Video Tutorial: Learn how to manage pending, active, overdue, and archived Project Activities including marking items complete and organizing your grid view. .
<https://www.loom.com/share/8e67845039a54cbea8d33f8815a1f49d>



Training/Events Module

The Training / Events Module is used to create and manage all types of trainings, meetings, and events.

Staff can build live or virtual events, conferences, and e-learning courses, and participants can register, pay fees, and track completion.

Use this Module to:

- Create and manage events, e-learning courses, and training series.
- Collect registrations and track attendance, training hours, and CEUs.
- Accept and track registration fees to your payment processor.
- Automate reminders, evaluations, and certificates.
- Generate Promo Pages for events.
- Record facilitation hours for billing or grant reporting.
- Run registration and completion reports for compliance and funding requirements.

Registrant Access to Training Module

Different user types access and use the Training / Events Module based on their login status and assigned access level.

Logged-in Users

Individual Contacts or Contact Staff:

- View trainings and events available to their Contact Type, including member-only or restricted-access sessions.
- Register for live, virtual, or e-learning courses and pay registration fees online.
- Access event details, join virtual sessions, and download certificates of completion.
- Track progress and view past registrations in the My Trainings dashboard.

Contact Admins:

- View, download, and track training records for all staff within their organization.
- Manage payments and invoices for multiple registrants.
- Access registration data and certificates for staff and Associated Contacts linked to their organization.

Public Users:

- View and register for events marked Open to All or link only events shared via the direct link.
- Complete registration and payment without logging in.

 **Video Tutorial:** Learn how different user types access, register, and manage training records in the Training / Events Module. <https://www.loom.com/share/6c52698d8fa846189ef0ffdc8410c146>

Dashboard

The Training Dashboard provides quick access to some upcoming events or eLearning Courses and recent activity.

The buttons at the top of the page mirror the menu options on the left side of the Module for easy navigation.



Dashboard Tools include:

- **Quick Search Bar:** Use the Quick Search bar at the top of the dashboard to find an event instantly by typing any part of its title.
- **Upcoming Training Series and Upcoming Training Events:** Displays a maximum of 8 upcoming series and 8 upcoming events..
- **Inactive E-Learning:** Access and continue designing online courses still in development.
- **E-Learning:** View and manage active online courses.

New Event

Use the **New Event** page to create and manage synchronous trainings where participants attend at the same time.

Examples include live webinars, in-person meetings, conferences, or guest-speaking sessions with or without registration.

This page includes all event setup fields—date, location, access, registration, trainers, and certificates.

 **Tip:** Use the **E-Learning** section of this module to create asynchronous or hybrid live/online courses.

 **Video Tutorial:** Learn how to create a new training or event from start to finish, including event details, trainers, and registration options.

<https://www.loom.com/share/165e03f6b7d7417086c571d659e2e154>

 **Note:** If the **Training Series** feature is enabled, a pop-up will appear when you click New Training Event asking whether to create a Single Event or a Series of Events.

- Selecting Series of Events allows you to create multiple linked events that share one registration page.
- Contact the CM Support Team to enable this feature.

Customization and Responsive Page Setup

 The **New Event** page is responsive. Some sections and fields update automatically based on your selections, for example, **Has Registrations** or **Has Registration Fee**.

Customization: Field labels and sections may differ by site configuration. You can hide, rename, add, or make fields and sections required. Contact the CM Support Team to enable these features and/or customize fields. For details on what can be updated, see the **System Configuration Handbook > Super Admin Section**.

 **Note:** *Because the page layout adjusts dynamically, this handbook organizes fields by category rather than on-screen order for easier setup and reference.*

Section Overview

- **Always Visible Event Creation Settings and Fields:** Appear on every new event record.
 - Basic Event Details



- Trainers and Funding Sources
- Access
- **Registration Enabled Settings and Fields:** Appear when registration is turned on.
 - Basic Registration Setup
 - Email Notifications to Coalition Staff
 - Registration Dates and Limits
 - Automatic and Custom Registration Emails and Texts
 - Certificates and Evaluations
- **Fee Enabled Settings and Fields:** Appear when registration fee is enabled.
 - Attendee Types
 - Regular Fees
 - Early Registration
 - Discount Codes and Reduced Group Rates
 - Additional Fees
- **Virtual Training:** Appear when Create as a Virtual Training is selected.
 - Virtual Training Type
 - User

Always Visible Event Creation Fields

The following fields appear on every event, even if registration is not collected.

Add Basic Event Details

- **Event Title:** Enter name of event.
- **Start Date and End Date:** Select the event date and time. The current date and time display by default.
- **Hours:** Enter total training hours (exclude breaks). This value may appear on certificates, if used.
- **Executive Summary:** Add internal notes for staff. This information auto-fills the Time Tracker's Activity Detail Description.
- **Description (Visible to Everyone):** Enter public event details that display on the promo page. Supports formatting, images, and hyperlinks.
- **Notes:** Enter internal planning details visible only to Coalition Staff.
- **Event Type and Location:** Select from the dropdown. These are often used for grant and data reporting.
- **Brochure URL:** Paste a link to an event brochure or webpage. The link displays on the promo page.
- **File Location:** Paste an internal server path or shared drive location for staff-only reference.
- **Tag:** Use tags to group trainings. Tags must match exactly for search results.
- **Venue:** Enter the physical address of the event. The address displays on the promo page with an embedded Google Map.
 - For virtual Zoom events, leave this field blank to display the Zoom logo instead.
- **Promo Image:** Upload an image to appear on the event's advertisement, dashboard, and public listings.
 - If no image is uploaded, the default image from *System Configuration > Site Specific Info* displays.
 - **File Type:** JPG or PNG
 - **Recommended Promo Image Size:** 560px X 350px
- **Content Areas:** Select the subjects or topics covered during the training. Some grants may require reporting on specific content areas.



- You can assign multiple Content Areas or Sub-Areas to each training to accurately reflect the subjects discussed.
- Content Areas can be configured as a single list or grouped by subcategories.
 - Contact the CM Support Team to enable this option.
- **Publication Information:** Select the publications distributed during the training and enter the number distributed.
- **Occupation Count Information:** Use this section when registration is **not** collected but you still need to report attendance by occupation. Group attendees by selecting each Occupation/Discipline from the dropdown and entering the total number of people in that category.
 - These totals save to the event record and combine with occupation counts from other events, whether or not registrations were used.
 -  **Tip:** Use this section to record counts for attendees who did not register so reporting totals stay accurate. If attendees **did** register and selected their occupation on the form, **do not** enter counts here or totals will be duplicated.
- **Custom Training Questions:** Select from the options created in your site's Custom Training Fields.
 - Common examples of Custom Training Fields include:
 - Grant deliverables or funding identifiers
 - Internal topic area or program category
 - Staff-assigned tracking codes

Add Trainers and Funding Sources

- **Trainers:** Use this section to record facilitation time and funding sources for the training. Trainer names appear on the promo page, and hours entered for staff trainers are logged automatically in Time Tracker.
 - **Coalition Trainers:** Click **Add Trainer**
 - **Staff:** Select from the list of Coalition Staff. This list is managed in Contact Manager > Coalition Staff.
 - **Billing Start Time:** Autofills with the date the event is created, use the calendar icon to edit if needed.
 -  If enabled, select the time that the billing started, autofills with the time the event is created, but can be changed using the clock.
 - **Funding Grant Source:** Select the funding source used for this event.
 -  **Program Category:** Select the relevant category if enabled.
 -  **Video Tutorial:** Learn how to configure and use Program Categories across TA, PA, and Training entries for program-level reporting and analysis.: <https://www.loom.com/share/3e95f79787e54ddb69c213c8e5c2b9>
 - **Billed Hour:** Enter facilitation hours (exclude admin prep). Used in Time Tracking and Event Data Summary.
 - **Non-Coalition Trainers:** Click Add Non-Coalition Trainer to include external facilitators. Trainers must first be added in *System Configuration > Training/Events > Non-Coalition Trainer*.
 -  **Note:** Adding trainers here is optional. Presenters can also be listed directly in the event description.
 - **Billing Start Time, Funding Grant Source, Program Category, and Billed Hour:** Billing and funding fields function the same as for Coalition Trainers.
 -  **Applicable Funding/Grant Sources:** If enabled, select the grant(s) linked to this training/event. This section appears only on sites that track grant-specific training requirements to separate reporting by funding source and content area.
 - **Impacted Fields:**
 - **Content Areas**
 - **Occupations in Occupation Count Information:** Impacts only the



occupations available to select for additional counts in the section at the bottom of the page. This does not change the occupation options visible to registrants during registration.

- **Custom Training/Event Questions**

Set Access Levels

Select who can view the event and who can register. This field defaults to Only Staff to prevent the event from being shared publicly before setup is complete.

- **Open to All:** Anyone can view the promo page, and anyone can register. The promo page appears on the **Upcoming Events** public page and for logged-in users. Events can also be shared to anyone by link.
- **All Contact Types with Login:** The promo page appears on the **Upcoming Events** public page, but only logged-in contacts can register.
- **Specific Contact Types with Login:** The promo page appears on the **Upcoming Events** public page, but only selected Contacts can register.
 - **Add Specific Contact:**
 - **Contact Type:** Select the Contact Type(s) who should have access.
 - If no specific Contact or Contact Staff restrictions are added, *all contacts within this Contact Type will have access.*
 - **Contact:** Select a Contact Individual or Organization to narrow access.
 - If the Contact is an organization and no Contact Staff are selected, *all Contact Staff under that organization will have access.*
 - **Contact Staff:** Select specific Contact Staff (if applicable) to further restrict access to only those individuals.
 - **Only Staff:** Limits viewing and registration to your Coalition's staff. Commonly used for in-service or internal trainings.
 - **Specific Staff:** Restricts access to designated staff members. Commonly used for in-service events for select staff.
 - **Specific Access Groups/Committees:** Restrict registration to selected Access Groups/Committees.
 - **Link Only:** Invite-only access. Promo page does not appear on the dashboard when logged in, but anyone with the link can view and register.

Enter Data for Trainings/Events without Registrations

Trainings or events without registrations are added the same way as other events; the only difference is that **Has Registrations** remains unchecked.

This option is commonly used for conference presentations, co-hosted events, or past trainings where attendee lists were not gathered in CM.

Add a Training/Event without Registrations

- **Event Details:** Enter the required fields and any additional fields needed for grant or reporting purposes, including billing.
- **Occupation/Discipline Count:** Enter the occupations of attendees to record the total number of participants by occupation or discipline. These totals combine with occupation counts from other events to provide complete reporting.



Registration Enabled Settings and Fields

When **Has Registration Information?** is checked, additional options appear. These settings control how participants register for the event and what information is collected.

- **Has Registration Information?:** Check this field when collecting registration information.
 - **⚠ Note:** Registrations has to be checked in order to use the Import Registration feature.

Add Basic Registration Setup

- **Has Regular Fee Information?:**
 - **Unchecked:** Use for free events.
 - **Checked:** Configure fees and discounts
 - Additional fields display (see **Events with Registration & Fees** section below).
- **Has CEU?:** Check this box to allow registrants to request continuing education credit at registration.
 - **CEU Information:** Section displays when **Has CEU?** Is checked.
 - Click **Add CEU:** Select from the list of available CEUs and enter the number of hours awarded. Designated CEU options display on the Training Registration Form.
 - CEU options are created in System Configuration > Trainings/Events > CEU
 - **Hours Offered:** Enter the number of hours awarded for each CEU Type. The CEU information automatically appears on Certificates of Completion when applicable and when the CEU field is included on the certificate layout.
 - Click **Add CEU** as needed to offer multiple credits types.
- **Is Registrant Approval Required?** Check this box to require your staff approval before registrants are added to the event. When enabled, a **Needs Approval** tab appears in the event's **Registration Grid**. Only approved registrants will receive confirmation emails and virtual join links.
 - **👤 Video Tutorial:** Learn how to enable and manage the registrant approval process for your events, including how to review, approve, or deny pending registrations.
<https://www.loom.com/share/3e06d59108044bcb95cc5939ba211bc9>
 - See section **Training/Event Management** below for additional details.
- **🔧 Has or Is a Pre-Req?:** Use this setting to designate a training as either fulfilling a prerequisite or requiring completion of another training before registration. This feature must be enabled by the CM Support Team and applies only to logged-in registrants. Pre-reqs are designed in System Configuration > Trainings/Events.
 - **Training Pre-req:** Displays when Has or is a Pre-Req is checked.
 - **Training Pre-req fulfilled by the training:** Select one or more pre-reqs that this training will satisfy.
 - **Training Pre-req that needs to be completed before registering to the training:** Select one or more pre-reqs that registrants must complete before registering.
- **Disable Group Registration:** Check this box to remove the group registration option for this specific event.
 - **👤 Video Tutorial:** Learn how to disable group registration for a training or event.
<https://www.loom.com/share/04f359c48dc84eeb95a74086c5c5d91c>
- **Accommodations:** Select the accommodations available for the training/event. These will appear as options for registrants during registration.
- **Attendee Releases:** Select the releases registrants will have the option to agree to before submitting registration.
- **Check-in Method:** Choose how attendance will be tracked for the event.



- **Regular Check-In:** Manually check in attendees by clicking **Check-In** next to their name on the **Registration List**. *Always use this method for virtual events.*
- **Single Check-In with Signature:** Registrants provide their date, time, and signature at check-in.
- **Multiple Check-Ins with Signature:** Registrants enter the date, time, and a signature each time they check in and out of the event. Use this method when attendees must record multiple attendance points (for example: signing in and out for breaks) or when more than one signature is needed (for example: attendee and supervisor).
- **⚠ Note:** For non-integrated events (not using Zoom or GoToWebinar), staff must manually check in each registrant.
- **⚠ Note:** Check-in is required for attendees to automatically receive evaluations and certificates of completion.
- **👤 Video Tutorial:** Learn how to select and use check-in methods for different event types. <https://www.loom.com/share/cd1f2041eb93464b915d8db3e4d76532>
- **Has Workshops?:** Check to add workshops or breakout sessions to the event. Registrants can select from a list of workshops to indicate their preferred session. (NOTE: Actual session attendance will not be tracked in this method.)
 - **Workshops:** A Workshops section appears at the bottom of the page.
 - Click **Workshop Information** (per workshop)
 - **Workshop Title:** Name of the workshop.
 - **Start and End Date:** Workshops with the same start and end date/time will be grouped together on the registration page. Registrants can select only one workshop per date/time slot.
 - **Max Attendee Count:** Once the number is reached, the workshop is no longer selectable.
 - **⚠ Note:** Workshops are for registration preference only and do not generate separate check-in lists, certificates, or workshop-specific emails.



Check-In Custom Questions

Check-in Custom Questions are used to show and answer specific questions when attendees are checked into an event. They are created by Coalition Admins in **System Configuration > Trainings/Events > Check-in Custom Fields**.

Question Sections are associated by Event Type. All events in that type will display the same custom Check-in Questions. Questions appear automatically when staff check in attendees.

Use Check-in Questions

- Must be logged in as **Coalition Staff or Admin**.
- Go to the **Registration** grid and click the icon to **Check-in the attendee**.
- The questions appear for each attendee.
- Enter responses and click **Submit**.
 - The attendee's status updates to **Checked-in (Attended)**.

Examples of Check-in Questions:

- Did the attendee turn in their pre-conference questionnaire?
- Was a post-session evaluation submitted?
- Any additional notes from the event facilitator?

These responses can be viewed later in the **Training Registration Grid** or in the **Attendance Summary Report**, where aggregated answers display in a summary section at the bottom of the



report.

 **Video Tutorial:** Learn how to configure Check-in Custom Fields and how responses appear during attendance tracking and reporting.

<https://www.loom.com/share/1f8200468cff4cf89e282a5c028b50ef>

Enable Email Notifications to Coalition Staff

Enter staff email address(es) to receive alerts for specific registration or event actions. Separate multiple addresses with commas.

- **Accommodations Notification Email:** Sends the transactional template Training Accommodation Notification when a registrant requests an accommodation.
 - If no email is entered, notifications are sent to the default email listed in System Configuration > Coalition Specific Info > Accommodations.
- **Event Registration Notification Email:** Sends the transactional template Registration Notification Email when someone registers for the event.
- **Event Registration Cancellation Notification Email:** Sends the transactional template Registration Cancellation Notification when a registrant cancels their registration.
 -  **Note:** This notification is not sent if the registration is cancelled manually by Coalition Staff.
- **Survey Notification Email:** Sends the transactional template Training Evaluation Completion when a registrant completes a linked survey.
- **Event Waitlist Email Notifications:** Sends the transactional template Registration Waiting List Admin Notification when an event reaches capacity and a registrant is added to the waitlist.
 -  **Note:** This notification is not sent if the registrant is upgraded to the Active list or registered by Coalition Staff.

Set Registration Dates and Limits

- **Registration Start Date:** Sets when the registration button appears on the promo page, allowing registrations to begin.
 - Coalition Staff can register attendees before this date if needed.
- **Registration End Date:** Sets when the registration button is removed from the promo page, preventing new registrations.
 - Coalition Staff can continue to add attendees after registration closes.
- **Attendee Capacity:** Set the maximum number of attendees allowed for the event. Capacity must be greater than 0 to save the event.
 - A **Waitlist** will activate automatically when capacity is reached.
- **Registration Cancellation Due Date:** Sets the deadline after which registrants can no longer cancel their own registration through the confirmation email or their CM login. Coalition Staff can cancel registrations at any time.
- **Allow Flexible Attendance:** Check this box for fee-based multi-day events if registrants can select specific dates to attend.
 - Additional options appear to set different fees for each day and attendee type.
- **Is Certification ID Required:** Require registrants to enter a certification ID during registration.

Automatic and Custom Registration Emails and Texts

When creating an event with registrations, you can send automatic and/or custom emails to participants.

 **Video Tutorial:** Learn how to create and send confirmation, reminder, and follow-up emails for



your training events. <https://www.loom.com/share/5435adaa544e49ce830ed14358a94cf7>

Automatic Emails: Emails are sent automatically from **MailJet** using **transactional templates** based on the event type and platform connection. These messages are triggered by standard registration actions.

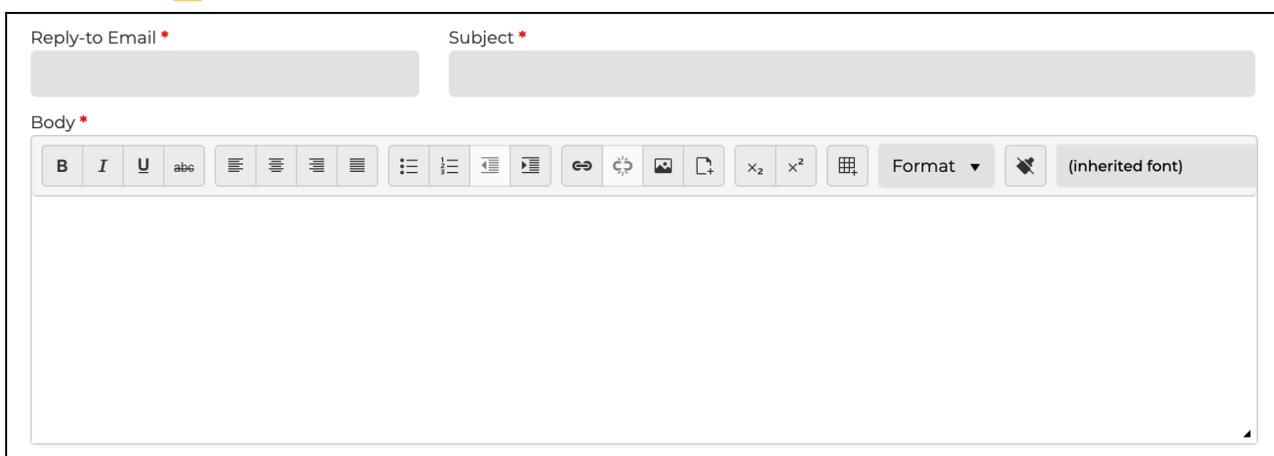
- **Training Registration Confirmation:** Automatically sent to registrants after successful registration for:
 - A **non-virtual (live)** event when a custom email is not used.
 - **Live Training Series:** One confirmation email listing all events in the series the registrant is registered for.
 -  **Tip:** You do not need to create a separate confirmation email for each event unless you want to include event-specific information.
 -  **Note:** For **Virtual Events**, the connected platform (**Zoom, Teams, or GoTo**) usually sends its own email automatically with a join link; some exclusions apply, so consult your virtual platform for specific case scenarios. If you want Coalition Manager to send an additional confirmation email, or if the virtual platform does not send a join link, select **Create a Custom Registration Email** in the event details.
- **Group Registration Confirmation:** Sent to all email addresses entered during a group registration.
- **Group Registration Invoice Email:** Sent to the email address entered at the end of group registration with a link to the group event registration invoice.
- **Training Registration Cancellation:** Sent automatically to the registrant when their individual registration is canceled.

Custom Emails: Different custom emails can be enabled by checking the boxes next to each email type in the event setup. When selected, a **Custom Email Creator** section appears at the bottom of the page to design the message.

- **Custom Registration Email?:** Check this box to create a custom confirmation email that registrants receive immediately after registering.
 - If this option is not selected and the event is not virtual, the default transactional **Training Registration Confirmation** email will be sent automatically from MailJet.
 -  **Video Tutorial:** View the options for Training Registration Confirmation emails in Coalition Manager.
<https://www.loom.com/share/0a3a4d41c82545d2ba8a50ac04edc88f>
- **Reminder Emails:** Create an email and/or text reminder to automatically send to registrants before the event.
 - **How many Days before Event to Remind?:** When Reminder Emails is checked, a box appears to enter the number of days in advance to send reminders.
 - For multiple reminders, separate numbers with commas (e.g., 1, 2, 7 sends reminders 1, 2, and 7 days before the event start date).
 -  **Note:** You cannot set a reminder for the same day as the event (0 days).
 - Messages are sent automatically on the morning of each selected day.
 -  **Video Tutorial:** Learn how to schedule and customize multiple automated reminder emails for upcoming trainings.
<https://www.loom.com/share/ff02d7c760b8495a820f92f8be34ceed>
- **Follow-Up Emails:** Create follow-up emails to send to registrants after the event. These are sent manually from the Registration Grid once the event has ended. Common uses include sending post-event updates, sharing future training opportunities, or providing access to related recordings or materials.



- **Follow-Up Email to Checked-in/Completed:** Sends to attendees marked as completed or checked in.
 - **Send Follow-Up Email to Registered but Cancelled/Not Completed:** Sends to registrants who cancelled their registration or did not attend.
 - **Follow-up Email to All Registered:** Sends to everyone who registered, including attendees, no-shows, and cancellations.
 -  **Video Tutorial:** Learn how to create and send follow-up emails to attendees and non-attendees. <https://www.loom.com/share/f8350c6573364b6c8eb3bfd6748f9299>
- **Custom Email Creator:** When any custom email box is checked, an editable section appears to create the email message.
 - **Reply-To Email:** Enter the address that should receive replies.
 - **Subject:** Email subject line (e.g., Don't forget...).
 - **Body:** Compose the message text. Use this space to include next steps, follow-up info, or social media links. You can format text, and add images, attachments, or hyperlinks.
 -  **Note:** For **GoToMeeting** events, include the meeting's **Join Link** in this message.



- **Custom Email Footer:** An automatic footer with quick-access links to **edit or cancel a registration, download an invoice, and add the event to a calendar** is at the bottom of every Reminder or Custom Confirmation email.

Automated Text Message Reminders

Text message reminders can be sent automatically to registrants for upcoming trainings. Messages are sent only when all of the following conditions are met:

Conditions (All must be met):

- The **Text Message Notification** feature is turned on for your CM site (contact CM Support to enable).
- The **registrant** has added a phone number to their account and **opted in** to receive text reminders.
- A **Reminder Email** has been created and enabled in the event setup.

How It Works:

- Texts follow the same schedule as your Reminder Email days.
- Registrants who choose **Text** as their preferred method receive a text in addition to the email.
- Message format: "Event — [Event Name] is happening in [#] days. See you soon."



Viewing Opt-ins for Automated Text Reminders: In the **Training Module > Training Event Attendees** grid, add the **Notification Reminder** column to view who has opted in for text message reminders or who will receive only email reminders.

- You can filter this column to quickly find text or email recipients.
- Coalition Staff and Admins can also edit a user's profile to update or change their notification preference between email and text.

 Contact CM Support to enable Text Message Notifications.

 **Video Tutorial:** Learn how text message reminders work.

<https://www.loom.com/share/14f39311e6e44c309b0112d3e28ae14b>

Certificates and Evaluations

Add an Evaluation

Use this section to connect post-event evaluations or feedback surveys created in the **Custom Forms** Module.

- **Is Survey Required for Completion?:** Select this option if attendees must complete a Custom Form before being marked as *Complete* or receiving their certificate.
- **Survey Link from Custom Forms:** Paste the link to a survey created in the Custom Forms Module. Links from surveys outside of CM (such as from Survey Monkey) will not be accepted.
 - Responses are automatically connected to the event, and a summary of results can be accessed by clicking the Evaluation Summary icon in the **Current Events** grid.
 -  **Note:** If a survey is required for completion of an event, the attendee will automatically be sent the certificate upon survey completion.
-  **Note:** Surveys do not need to be required to enable the survey function. If not required, attendees can still receive and download their certificate (if applicable) once it is emailed, even without completing the evaluation.
- For instructions on sending surveys to attendees after the event, see the **Registrations Grid** section.

Add a Certificate

Select the type of certificate (if any) for the event.

- **Use Default Certificate:** Default option. Sends the default certificate created in System Configuration.
- **Use Custom Certificate:** Create a certificate specific to this event.
 - **File Type:** JPG, horizontal or vertical, 8x11"
 - Click **Design Certificate** after saving the event to open the certificate editor.
 - Click **Add Field** to insert fields one at a time, selecting font style, size, justification, and formatting.
 - Drag each red field box to position it on the certificate layout, then click **Save Layout**.
- **No Certificate:** Select this option if no certificate will be used for the event.
-  **Video Tutorial:** Learn how to select or customize certificates of completion for an event.
<https://www.loom.com/share/fla7f84511954244978c3e57e618b026>

Events with Registration and Fees

Has Regular Fee Information: To collect and manage event fees, check Has Regular Fee Information. This opens additional sections on the event page.



Designate Attendee Types

Create groups of registrants that pay specific fees (for example, Members, Non-Members, or Sponsors). When setting up a training or e-learning event, select the applicable Attendee Types and assign their fee structures.

Attendee Types can be restricted to users who are logged in or belong to specific Contact Types. Attendee Types are created in **System Configuration > Trainings/Events > Attendee Type**.

Attendee Types: If event fees vary by type, select the applicable options from the dropdown list. Each selected type appears in the Fee Information section as a separate pricing option.

- **⚠ Note:** If none are selected, all types are visible when setting fees by Attendee Type.
 - **Everyone (with or without login):** Anyone can view and select this Attendee Type and its associated fee.
 - **Contact Types:** Only selected Contact Types can view and select this fee. They must be logged in and belong to that Contact Type.
 - **Only Coalition Staff:** Only your organization's logged-in staff can view and select this Attendee Type and its fee.
 - **Everyone with login:** All logged-in CM users can view and select this Attendee Type and its fee.
- **👤 Video Tutorial:** Learn how to create and select Attendee Types with different fee levels for training and e-learning events:
<https://www.loom.com/share/84f57128d6c94fa6ac508cc8ef9dacc8>

Set Up Regular Fees for a Training/Event

Regular fees are the base fee for an event. If Early Registration is enabled, Regular Fees go into effect after the Early Registration Period Ends.

- **Payment Method:** Select which payment methods are available for the event. If none are selected, all methods apply.
 - **Online:** Connects to the payment processor for credit card and/or ACH transactions.
 - **⚠ Note:** Only a Payment Method named **"Online"** connects to credit card or ACH processing. Ensure a method with this exact name exists in *System Configuration > Trainings/Events > Payment Method*. Changing this terminology will disable the online payment processing setup.
 - **Offline Payment:** (e.g., check, pay at event) Created in System Configuration. These payment methods require staff to later mark registrants as paid in the registrations grid. Registrations are submitted even though payment is not completed at sign-up.
 - **⚠ Note:** With offline payment, registrants remain **unpaid** until staff update payment; certificates (if applicable) are not able to be downloaded until the fee is marked as paid.
- **Fee Structure:** Select the type of payment structure:
 - **One Fee for All:** All registrants pay the same flat-fee.
 - **Total Registration Fee:** Enter the fee for the event.
 - **Multiple Fees by Attendee Type:**
 - **Rows:** A row displays for each Attendee Type.
 - **Columns:** A row for Entire Fee displays. If Flexible Attendance was selected, a column will display for each day to create an individual day cost.
- **🔧 Accounting Code:** Select an accounting ledger code for this event.

Set Up Early Registration for a Training/Event

- **Early Registration Information?:** Check this box to display fields for defining the early



registration period and fee structure. This can be used to incentivize early registration or penalize late registration.

- **End Date:** Autofills with the event date. Select the final date of early registration. After this date, the regular fee automatically applies.
- **Fee Structure:** Choose **One Fee for All** or **Multiple Fees by Attendee Type**. The setup matches the regular fee structure described above.

- Early Registration Information

Fee Structure *	Total Registration Fee *	End Date *
One Fee For All	\$0.00	9/16/2025

Create a Discount Code or Reduced Group Rate

- Click **Add Discount Code and Reduced Group Rates**
- **Discount Code Type:** Select the type of discount: **Regular** and/or **Group**.
 - **Regular Discount:** Attendees enter a code during registration to receive the discount.
 - **Discount Amount Type:** Choose how the discount is applied:
 - **Percentage:** Applies a percentage off the total fee.
 - **In Dollar:** Applies a flat amount off the total fee.
 - **Discount Code Name:** Internal name for staff reference.
 - **Discount Code:** The exact code registrants must enter to receive the discount.
 - **Discount Amount/Percentage:** Enter the percentage or dollar amount to reduce from the total registration fee.
 - **Apply Discount On:** Choose which portion the discount applies to:
 - **Registration Only**
 - **Additional Items Only**
 - **Both**
 - **Group Discount:** Automatically applies when registrants use the group registration and meet the applicable number of participants.
 - **Minimum and Maximum Participants:** Define the participant range for each group discount.
 - **⚠ Note:** Do not overlap number ranges when creating multiple group discounts.
 - **Discount Amount Type:** Choose how the discount is applied:
 - **Percentage:** Applies a percentage off the total fee.
 - **In Dollar:** Applies a flat amount off the total fee.
 - **Discount Amount/Percentage:** Enter the percentage or dollar amount to reduce from the total registration fee.
 - **Apply Discount On:** Choose one of the following:
 - **Registration Only**
 - **Additional Items Only**
 - **Both**
- **👤 Video Tutorial:** Create various codes for registrants to access reduced rates.
<https://www.loom.com/share/571d838f69ec44b989a90d9a3d49b0bc>

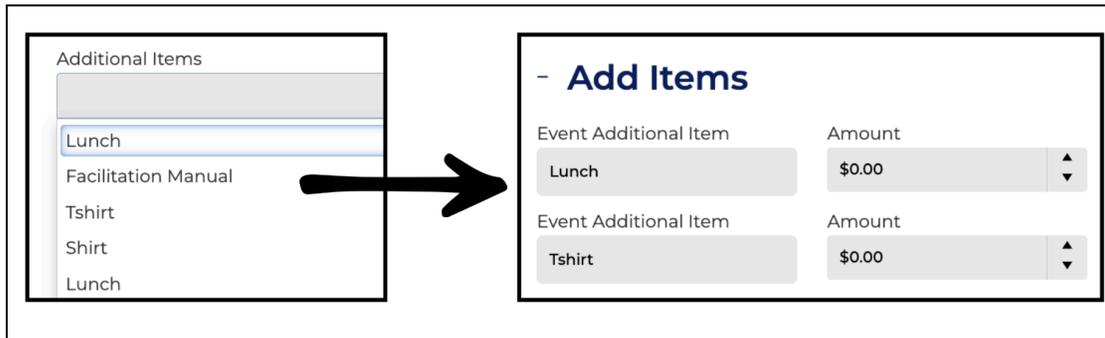
Add an Additional Fee

Optional, fee-based items such as meals, t-shirts, or manuals can be added to a registration so attendees can purchase extras during checkout. These items must first be created in System Configuration > Trainings/Events > Additional Items. When registrants complete their registration, they can select which add-ons to purchase. The total cost automatically updates to include the selected items.

- **Has Additional Fee?:** Check this box to display the Additional Items section and the Additional Items Field.



- **Additional Items (Field):** Appears earlier on the page under Accommodations and Attendee Type. Select the items you would like to offer for this event.
 - The selected item(s) will appear lower on the page in the Additional Items section.
- **Additional Items (Section):** Each additional item selected earlier will display here.
 - **Amount:** Enter the cost of each Additional Item next to the applicable field.
-  **Video Tutorial:** Learn how to add optional items like meals or materials to a paid registration. <https://www.loom.com/share/86695f55be1c40ca8057524ec24f81ee>



Virtual Training

Create a Virtual Training

- **Create as a Virtual Training?:** Check this box for events held via **Zoom**, **GoToMeeting/Webinar**, or **Microsoft Teams**.
 - A new section appears at the bottom of the event page to select the virtual platform information.
 - **Virtual Training Settings:**
 - **Zoom and GoToMeeting**
 - **Training Type:** Select *Meeting* or *Webinar*.
 - **User:** Select the user account under which the event will be created.
 - **Event Password (Optional):** Create a password if required by your Zoom or GoTo settings.
 -  **Note:** Do not enter your personal password. Attendees will only need to enter this when joining through the app without their direct link.
 - **Microsoft Teams:**
 - **Training Type:** Only Meeting is available.
 - **User:** Select the user account under which the event will be created.
 - When selected, Coalition Manager:
 - Automatically creates the event in the connected platform.
 -  **Note:** Do NOT set up the event separately in your virtual platform.
 - Automatically registers attendees for the meeting or webinar.
 - **Zoom** and **GoToWebinar** send automated unique join links to registrants.
 - **GoToMeeting** uses a shared meeting link that must be sent manually using **Custom Confirmation** and/or **Reminder Emails**.
 - **Microsoft Teams** events appear instantly on the host's **Outlook** and **Teams** calendar.
 -  **Video Tutorial:** Learn how to create a virtual event, connect a Zoom, Teams, or GoTo meeting, and manage registrant access. <https://www.loom.com/share/77f41aae50cd4bbb81a38a2deb485367>
 - See section **Virtual Event Management** below for additional details.



Save Event: After clicking Save, a confirmation message appears indicating the event was created successfully. From this page, you can:

- **Add New Event:** Opens a blank event form to create a new training or event.
- **Duplicate Training:** Copies the event details into a new one. Update the title, date, and other details as needed.
- **Edit Training:** Reopens the event record in edit mode to make changes.
- **View Training:** Opens the event's promo page.
- **Current Events:** Opens the Current Events grid..

Training/Event Promo Page

Each Training/Series Event will have a promo page. This page displays event details and provides participants with a registration link, if registration is enabled.

Promo Page Functions for Registrants:

- **Register:** Visible only during open registration dates and when access permissions are met.
- **Share:** The event promo page via email or social media
- **Google/Export Calendar:** Click the calendar buttons to add the event to your personal calendar.
- **Tags:** Click on any of the tags to find other trainings with the same tag.

 **Series Promo Pages:** Displays an overview of all events included in a series. When Register is clicked, you are taken to a page to register for any available dates in the series.

- Depending on the setup, you may be required to register for all events or select only the sessions you wish to attend.
- Each event title/date links to its individual promo page for detailed information.

Promo/Event Details Page Functions for Coalition Staff:

- **Registrations:** View total registration counts, click on the hyperlink to open the Registration Grid, or access registrant email addresses (click a registrant's name to open a new email).
- **Edit:** Update event details directly from the promo page.
- **Archive:** Removes the event from search results and closes registration for participants.
- **Duplicate:** Creates an exact copy of the event to use as a template for a new one.
- **Cancel Event:** Cancels the event and allows Coalition Staff or Administrators to send a custom email to all registered participants. The event then moves to the **Canceled** tab under *Current Events*.
 -  **Video Tutorial:** Learn how to cancel an event and notify registrants:
<https://www.loom.com/share/8128391259034b28a593326253fa72ff>

New E-Learning

The E-Learning section allows you to create asynchronous online learning experiences for participants. Courses can range from simple recorded webinars with an evaluation at the end to advanced, multi-lesson certification programs featuring timed lessons, quizzes, and discussion boards.

 **Live Online/Hybrid Courses:** E-Learning courses can also include a Live component, allowing you to create hybrid events that combine a live session with ongoing online asynchronous coursework.



Basic Structure: Begin by creating the basic course details—such as the title, access level, and description. After saving, you will be directed to the **Design Dashboard**, where you can build the course structure.

- Create **Sections** to organize content.
- Add **Resources** (videos, documents, links or audio files) and **Quizzes** to each section.

 **Video Tutorial:** Learn how to design an online course, add lessons, and upload resources. <https://www.loom.com/share/1eaf9f6f04364ef98ec0c0502a48b3a9>

Customization and Responsive Page Setup

The **New E-Learning** page is responsive. Some sections and fields update automatically based on your selections, for example **Has Registration Fee** or **Live Event**.

Customization: Field labels and sections may differ by site configuration. You can hide, rename, add, or make fields and sections required. Contact the CM Support Team to enable these features and/or customize fields. For details on what can be updated, see the **System Configuration Handbook > Super Admin Section**.

 **Note:** Because the page layout adjusts dynamically, this handbook organizes fields by category rather than on-screen order for easier setup and reference.

Section Overview

- **Always Visible Event Creation Settings and Fields:** Appear on every new e-learning record.
 - Basic Event Details
 - Trainers and Funding Sources
 - Discussion Boards
 - Access Levels
 - Registration Dates and Limits
 - Automatic and Custom Registration Emails and Texts
 - Email Notifications to Coalition Staff
- **E-Learnings with Fees:** Appear when registration fee is enabled.
 - Attendee Types
 - Fee Structures and Additional Options
- **Virtual Training**
 - Live/Online

Always Visible Event Creation Fields

The following fields are always visible on the New E-Learning page, regardless of whether a registration fee is collected.

These core details are required to set up every training or event and appear on all sites, unless otherwise removed.

Add Basic Event Details

- **Event Title:** Enter name of event.



- **Hours:** Enter total training hours. This value may appear on certificates if used.
-  **Live Event:** Check this box if your site has Live Online/Hybrid Trainings enabled and you want this training to include a live session. When selected, a new section called Live Event Information appears below.
 - **Virtual Event:** If Live Event is checked, you can also select Virtual Event to indicate the session will be held online (via **Zoom, GoToMeeting/Webinar, or Microsoft Teams.**) Checking this box displays an additional section to enter virtual event details.
 -  **Note:** If Virtual Event is not checked, the Live Event Information section will still display for hybrid or in-person sessions.
- **Description** Enter public event details that display on the promo page. Supports formatting, images, and hyperlinks.
- **Admin Notes:** Enter internal planning details visible only to Coalition Staff.
- **Categories:** Select E-Learning Category. These categories group E-Learnings on the Upcoming Events page.
- **Brochure URL:** Paste a link to an event brochure or webpage. The link displays on the promo page.
- **File Location:** Paste an internal server path or shared drive location for staff-only reference.
- **Has Registration Information?:** Box is always checked.
- **Has Regular Fee Information?:**
 - **Unchecked:** Use for free events.
 - **Checked:** Configure fees and discounts
 - Additional fields display (see **E-Learnings with Fees** section below).
- **Has CEU?:** Check this box to allow registrants to request continuing education credit at registration.
 - **CEU Information:** Section displays when **Has CEU?** Is checked.
 - Click **Add CEU:** Select from the list of available CEUs and enter the number of hours awarded. Designated CEU options display on the Training Registration Form.
 - CEU options are created in System Configuration > Trainings/Events > CEU
 - **Hours Offered:** Enter the number of hours awarded for each CEU. The CEU information automatically appears on Certificates of Completion when applicable and when the CEU field is included on the certificate layout.
 - Click **Add CEU** as needed to offer multiple credits types.
- **Is Registrant Approval Required?** Check this box to require your staff approval before registrants are added to the event. When enabled, a **Needs Approval** tab appears in the event's **Registration Grid.**
 - Only approved registrants will receive confirmation emails and online course dashboard links.
 -  **Video Tutorial:** Learn how to enable and manage the registrant approval process for your events, including how to review, approve, or deny pending registrations. <https://www.loom.com/share/3e06d59108044bcb95cc5939ba211bc9>
 - See section **Event Management** below for additional details.
-  **Has or Is a Pre-Req?:** Use this setting to designate a training as either fulfilling a prerequisite or requiring completion of another training before registration. This feature must be enabled by the CM Support Team and applies only to logged-in registrants. Pre-reqs are designed in System Configuration > Trainings/Events.
 - **Training Pre-req:** Displays when Has or is a Pre-Req is checked.
 - **Training Pre-req fulfilled by the training:** Select one or more pre-reqs that this training will satisfy.
 - **Training Pre-req that needs to be completed before registering to the training:** Select one or more pre-reqs that registrants must complete before registering.



- **Disable Group Registration:** Check this box to remove the group registration option for this specific event.
 -  **Video Tutorial:** Learn how to disable group registration for a training or event. <https://www.loom.com/share/04f359c48dc84eeb95a74086c5c5d91c>
- **Tag:** Use tags to group trainings. Tags must match exactly for search results.
- **Survey Link:** Paste the link to a survey created in the Custom Forms Module. Links from surveys outside of CM (such as from Survey Monkey) will not be accepted.
 - This survey will be emailed to participants after completion of the E-Learning Course and is in addition to the final evaluation that must be completed within the course. Survey link is not required for training completion and participants will be able to download their certificate with or without completing this survey.
- **Days to complete training after registration:** Sets the number of days a registrant has to complete the training after registering. After this period ends, the registrant can no longer complete the training unless site staff extend the deadline. The course is marked as incomplete and the registration appears in the **Expired** tab.
- **Promo Image:** Upload an image to appear on the event's advertisement, dashboard, and public listings.
 - If no image is uploaded, the default image from *System Configuration > Site Specific Info* displays.
 - **File Type:** JPG or PNG
 - **Image Size:** 560px X 350px
- **Content Areas:** Select the subjects or topics covered during the training. Some grants may require reporting on specific content areas.
 - You can assign multiple Content Areas or Sub-Areas to each training to accurately reflect the subjects discussed.
 - Content Areas can be configured as a single list or grouped by subcategories.
 - Contact the CM Support Team to enable this option.
- **Certificate:** Select the type of certificate (if any) to be emailed automatically to registrants marked as **Completed** after the event.
 - **Use Default Certificate:** Default option. Sends the default certificate created in **System Configuration**.
 - **Use Custom Certificate:** Create a certificate specific to this event.
 - **File Type:** JPG, horizontal or vertical, 8x11"
 - Click **Design Certificate** after saving the event to open the certificate editor.
 - Click **Add Field** to insert fields one at a time, selecting font style, size, justification, and formatting.
 - Drag each red field box to position it on the certificate layout, then click **Save Layout**.
 - **No Certificate:** Select this option if no certificate will be used for the event.
 -  **Video Tutorial:** Learn how to select or customize certificates of completion for an event. <https://www.loom.com/share/f1a7f84511954244978c3e57e618b026>
- **Custom Training Questions:** Select from the options created in your site's **Custom Training Fields**.
 - Common examples of Custom Training Fields include:
 - Grant deliverables or funding identifiers
 - Internal topic area or program category
 - Staff-assigned tracking codes

Add Trainers and Funding Sources

- **Trainers:** Use this section to record facilitation time and funding sources for the training. Trainer names appear on the promo page, and hours entered for staff trainers are logged



automatically in Time Tracker.

- **Organization Trainers:** Click **Add Trainer**
- **Staff:** Select from the list of Organizational Staff managed in Contact Manager > Organizational Staff.
- **Billing Start Time:** Autofills with the date the event is created, use the calendar icon to edit if needed.
 -  If enabled, select the time that the billing started, autofills with the time the event is created, but can be changed using the clock.
- **Funding Grant Source:** Select the funding source used for this event.
-  **Program Category:** Select the relevant category if enabled.
 -  **Video Tutorial:** Learn how to configure and use Program Categories across TA, PA, and Training entries for program-level reporting and analysis.: <https://www.loom.com/share/3e95f79787e54ddb69c213c8e5c2b9>
- **Billed Hour:** Enter facilitation hours (exclude admin prep). Used in Time Tracking and Event Data Summary.
- **Non-Organization Trainers:** Click **Add Non-Organization Trainer** to include external facilitators. Trainers must first be added in *System Configuration > Training/Events > Non-Coalition Trainer*.
 -  **Note:** Adding trainers here is optional. Presenters can also be listed directly in the event description.
- **Billing Start Time, Funding Grant Source, Program Category, and Billed Hour:** Billing and funding fields function the same as for Organization Trainers.
-  **Applicable Funding/Grant Sources:** If enabled, select the grant(s) linked to this funding source. This section appears only on sites that track grant-specific training requirements to separate reporting by funding source and content area.
 - **Impacted Fields:**
 - **Content Areas**
 - **Occupations in Occupation Count Information:** Impacts only the occupations available to select for additional counts in the section at the bottom of the page. This does not change the occupation options visible to registrants during registration.
 - **Custom Training/Event Questions**

Add Discussion Boards

Create a Course Discussion Board and set approval preferences.

- **Use Course Discussion Board:** Check this box in Event Details to enable a shared discussion area that appears at the top of the E-Learning course. When selected, the following options display.
 - **Course Discussion Posts Need to be Approved?:** Require approval before participant posts appear.
 - **Course Discussion Replies Need to be Approved?:** Require approval before participant replies appear.
 - **Discussion Board Notification Email:** Enter the email addresses of those who should receive the *Discussion Post Response Notification* email when a new post or reply is submitted.
 - The email includes a link for moderators to approve or deny the post if approval is required.
 -  **Note:** Course-level and lesson-level boards function independently. A course can include one or both.
 - See section **Trainings/Events Management** below for additional details.



Set Access Levels

Select who can view and/or register for the training. Defaults to Only Staff when creating.

- **Open to All:** Anyone can register. The promo page appears on the Upcoming Events public page and for logged-in users. Events can also be shared to anyone by link.
- **All Contact Types with Login:** The promo page appears on the **Upcoming Events** public page, but only logged-in contacts can register.
- **Specific Contact Types with Login:** The promo page appears on the **Upcoming Events** public page, but only selected Contacts can register.
 - **Add Specific Contact:**
 - **Contact Type:** Select the Contact Type(s) who should have access.
 - If no specific Contact or Contact Staff restrictions are added, *all contacts within this Contact Type will have access.*
 - **Contact:** Select a Contact Individual or Organization to narrow access.
 - If the Contact is an organization and no Contact Staff are selected, *all Contact Staff under that organization will have access.*
 - **Contact Staff:** Select specific Contact Staff (if applicable) to further restrict access to only those individuals.
- **Only Staff:** Limits viewing and registration to your organization's staff. Commonly used for in-service or internal trainings.
- **Specific Staff:** Restricts access to designated staff members. Commonly used for in-service events for select staff.
- **Specific Access Groups/Committees:** Restrict registration to selected Access Groups/Committees.
- **Link Only:** Invite-only access. Promo page does not appear on the dashboard when logged in, but anyone with the link can view and register.

Set Registration Dates and Limits

- **Registration Start Date:** Registrants can begin registering on or after this date and time.
 - Coalition Staff can register attendees before this date if needed.
- **Registration End Date:** Registrants cannot register after this date and time.
 - Coalition Staff can continue to add attendees after registration closes.
- **Attendee Capacity:** Set the maximum number of attendees allowed for the event. This includes both In Progress and Completed attendees. When maximum capacity is met, registrations will be added to the Waitlist.
 - **Tip:** If the course has no capacity limit, set the number very high.
- **Is Certification ID Required:** Require registrants to enter a certification ID during registration.

Automatic and Custom Registration Emails and Texts

When creating an E-Learning you can send automatic and/or custom emails to participants and organizers.

 **Video Tutorial:** Learn how to create and send confirmation, reminder, and follow-up emails for your training events. <https://www.loom.com/share/5435adaa544e49ce830ed14358a94cf7>

Automatic Emails: Emails are sent automatically from **MailJet** using **transactional templates** based on the event type and platform connection. These messages are triggered by standard registration actions.

- **Training Registration Confirmation:** Automatically sent to registrant if Live/Online is enabled and checked, and a **non-virtual (live)** event is part of this E-Learning AND when a



custom email is not used.

-  **Tip:** You do not need to create a separate confirmation email for each event unless you want to include custom information.
-  **Note:** For **Virtual Events**, the connected platform (**Zoom, Teams, or GoTo**) usually sends its own join email automatically with a join link. *Some exclusions apply, so consult your virtual platform for specific case scenarios. If you want CM to send an additional confirmation email or if the virtual platform does not send a join link, select **Create a Custom Registration Email** in the event details.
- **Group Registration Confirmation:** Sent to all email addresses entered during a group registration.
- **Group Registration Invoice Email:** Sent to the email address entered at the end of group registration with a link to the group event registration invoice.
- **Online Training Access Link Email:** Sent to registrant after registering for an E-Learning training when the training is Active. This provides them the link they need to access their unique course dashboard in the E-Learning. If they don't have system access (a Login) then they need to make sure they keep this email to access their training and certificate when completed.

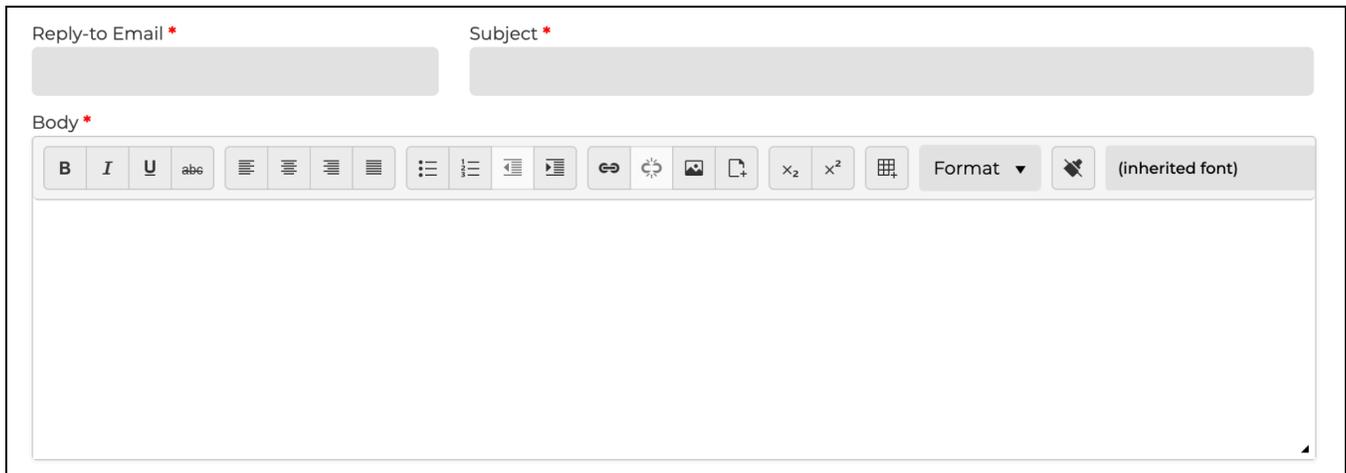
Custom Emails: Different custom emails can be enabled by checking the boxes next to each email type in the event setup. When selected, a **Custom Email Creator** section appears at the bottom of the page to design the message.

- **Custom Registration Email?:** Check this box to create a custom confirmation email that registrants receive immediately after registering.
 - If this option is not selected and the event is not virtual, the default transactional **Training Registration Confirmation** email will be sent automatically from MailJet.
- **Follow-Up Emails:** Create follow-up emails to send to registrants after the Live portion of the Live Online Course. Follow-up emails are **sent manually** from the **Registration Grid** after the event has ended. Common uses include sending post-event updates, sharing future training opportunities, or providing instructions for accessing recordings or materials through the Course Dashboard.
 - **Follow-Up Email to Checked-in/Completed:** Sends to attendees marked as completed or checked in.
 - **Send Follow-Up Email to Registered but Cancelled/Not Completed:** Sends to registrants who cancelled or did not attend.
 - **Follow-up Email to All Registered:** Sends to all registrants, including those *In Progress, Completed, and Cancelled*.
- **Reminder Emails:** When Live Event is checked, this box appears. Check this box to create an email and/or text reminder to automatically send to registrants before the Live event.
 - **How many Days before Event to Remind?:** When **Reminder Email** is checked, a box appears to enter the number of days in advance to send reminders.
 - For multiple reminders, separate numbers with commas (e.g., 1, 2, 7 sends reminders 1, 2, and 7 days before the event).
 -  **Note:** You cannot set a reminder for the same day as the event (0 days).
 - Messages are sent automatically on the morning of each selected day.
 -  **Video Tutorial:** Learn how to schedule and customize multiple automated reminder emails for upcoming trainings.
<https://www.loom.com/share/ff02d7c760b8495a820f92f8be34ceed>
- **Custom Email Creator:** When any custom email box is checked, an editable section appears



to create the email message.

- **Reply-To Email:** Enter the address that should receive replies.
- **Subject:** Email subject line (e.g., Don't forget...).
- **Body:** Compose the message text. Use this space to include next steps, follow-up info, or social media links. You can format text, and add images, attachments, or hyperlinks.
- **⚠ Note:** For **GoToMeeting** events, include the meeting's **Join Link** in this message.



- **Custom Email Footer:** An automatic footer with quick-access links to **edit or cancel a registration** and **add the event to a calendar** is at the bottom of every Reminder or Custom Confirmation email.

[Add to Google Calendar](#) | [Export Calendar](#) | | [Edit Registration](#) | [Cancel Registration](#)

Enable Email Notifications to Coalition Staff

Enter staff email address(es) to receive alerts for specific registration or event actions. Separate multiple addresses with commas.

- **Event Registration Notification Email:** Sends the transactional template **Registration Notification Email** when someone registers for the course.
- **Event Registration Cancellation Notification Email:** Sends the transactional template **Registration Cancellation Notification** when a registrant cancels their registration.
 - **⚠ Note:** This notification is not sent if the registration is cancelled manually by Coalition Staff.
- **Event Waitlist Email Notifications:** Sends the transactional template **Registration Waiting List Admin Notification** when an event reaches capacity and a registrant is added to the waitlist.
 - **⚠ Note:** This notification is not sent if the registrant is upgraded to the Active list or registered by Coalition Staff.
- **Email for Grading Quiz:** If the course includes open-ended questions that must be graded for quiz completion, enter the email address(es) of staff who should receive notifications when a quiz is submitted and ready for review.
 - Each time a participant submits a quiz that requires approval, the designated staff will receive an email notification containing a direct link to the quiz for grading.
 - See section **Trainings/Events Management** below for additional details



E-Learnings with Fees

Has Regular Fee Information: To collect and manage event fees, check Has Regular Fee Information. This opens additional sections on the event page:

Designate Attendee Types

Create groups of registrants that pay specific fees (for example, Members, Non-Members, or Sponsors). When setting up a training or e-learning event, select the applicable Attendee Types and assign their fee structures.

Attendee Types can be restricted to users who are logged in or belong to specific Contact Types. Attendee Types are created in *System Configuration > Trainings/Events > Attendee Type*.

Attendee Types: If event fees vary by type, select the applicable options from the dropdown list. Each selected type appears in the Fee Information section as a separate pricing option.

- **⚠ Note:** If none are selected, all types are visible when setting fees by Attendee Type.
 - **Everyone (with or without login):** Anyone can view and select this Attendee Type and its associated fee.
 - **Contact Types:** Only selected Contact Types can view and select this fee. They must be logged in and belong to that Contact Type.
 - **Only Coalition Staff:** Only your organization's logged-in staff can view and select this Attendee Type and its fee.
 - **Everyone with login:** All logged-in CM users can view and select this Attendee Type and its fee.
- **👤 Video Tutorial:** Learn how to create and select Attendee Types with different fee levels for training and e-learning events:
<https://www.loom.com/share/84f57128d6c94fa6ac508cc8ef9dacc8>

Fee Structures and Additional Options

Set Up Regular Fees for an E-Learning

Regular fees are the base fee for an event. If Early Registration is enabled, Regular Fees go into effect after the Early Registration Period Ends.

- **Payment Method:** Select which payment methods are available for the event. If none are selected, all methods apply.
 - **Online:** Connects to the payment processor for credit card or ACH transactions.
 - **⚠ Note:** Only a Payment Method named **“Online”** connects to credit card or ACH processing. Ensure a method with this exact name exists in *System Configuration > Trainings/Events > Payment Method*. Changing this terminology will disable the online payment processing setup.
 - **Offline Payment:** (e.g., check, pay at event) created in System Configuration require staff to later mark registrants as paid in the registrations grid. Registrations are collected even if payment is not completed at sign-up.
 - **⚠ Note:** With offline payment, registrants remain **unpaid** and **incomplete** until staff update payment; certificates (if applicable) are not accessible until paid.
- **Fee Structure:** Select the type of payment structure:
 - **One Fee for All:** All registrants pay the same fee.



- **Total Registration Fee:** Enter the fee for the event.
 - **Multiple Fees by Attendee Type:**
 - **Rows:** A row displays for each Attendee Type.
 - **Columns:** A row for Entire Fee displays.
-  **Accounting Code:** Select an accounting code for this event.

Set Up Early Registration for an E-Learning

- **Early Registration Information?:** Check this box to display fields for defining the early registration period and fee structure.
- **End Date:** Autofills with the event date. Select the final date of early registration. After this date, the regular fee applies.
- **Fee Structure:** Choose **One Fee for All** or **Multiple Fees by Attendee Type**. The setup matches the regular fee structure described above.

- Early Registration Information

Fee Structure * One Fee For All	Total Registration Fee * \$0.00	End Date * 9/16/2025
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Create a Discount Code or Reduced Group Rate

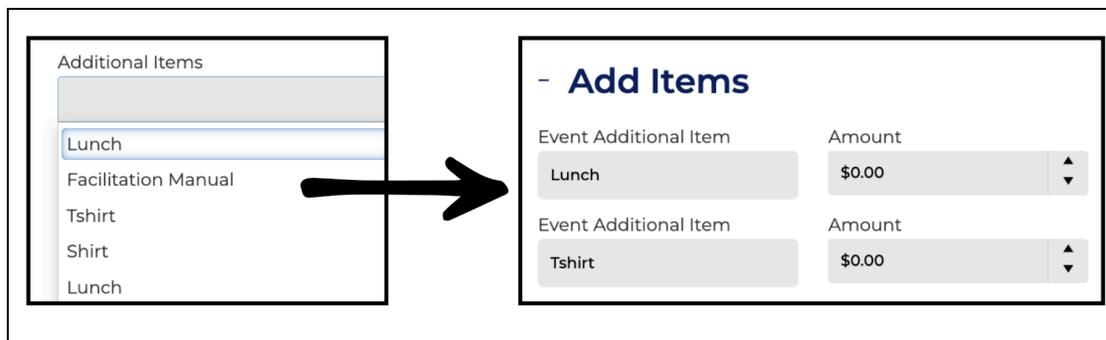
- Click **Add Discount Code**
- **Discount Code Type:** Select the type of discount: **Regular** or **Group**.
 - **Regular Discount:** Attendees enter a code during registration to receive the discount.
 - **Discount Amount Type:** Choose how the discount is applied:
 - **Percentage:** Applies a percentage off the total fee.
 - **In Dollar:** Applies a flat amount off the total fee.
 - **Discount Code Name:** Internal name for staff reference.
 - **Discount Code:** The exact code registrants must enter to receive the discount.
 - **Discount Amount/Percentage:** Enter the percentage or dollar amount to reduce from the total registration fee.
 - **Apply Discount On:** Choose which portion the discount applies to:
 - **Registration Only**
 - **Additional Items Only**
 - **Both**
 - **Group Discount:** Automatically applies when registrants use the group registration and meet the applicable number of participants.
 - **Minimum and Maximum Participants:** Define the participant range for each group discount.
 -  **Note:** Do not overlap number ranges when creating multiple group discounts.
 - **Discount Amount Type:** Choose how the discount is applied:
 - **Percentage:** Applies a percentage off the total fee.
 - **In Dollar:** Applies a flat amount off the total fee.
 - **Discount Amount/Percentage:** Enter the percentage or dollar amount to reduce from the total registration fee.
 - **Apply Discount On:** Choose one of the following:
 - **Registration Only**
 - **Additional Items Only**
 - **Both**
-  **Video Tutorial:** Create various codes for registrants to access reduced rates.
<https://www.loom.com/share/571d838f69ec44b989a90d9a3d49b0bc>



Add an Additional Fee

Optional, fee-based items such as meals, extra manuals, or other add-ons can be included during registration so registrants can purchase extras at checkout. These items must first be created in System Configuration > Trainings/Events > Additional Items. When registrants complete their registration, they can select which add-ons to purchase. The total cost automatically updates to include the selected items.

- **Has Additional Fee?:** Check this box to display the Additional Items section and the Additional Items Field.
- **Additional Items (Field):** Appears early on the page under Accommodations and Attendee Type. Select the items you would like to offer for this event.
 - The selected item(s) will appear lower on the page in the Additional Items section.
- **Additional Items (Section):** Each additional item selected earlier will display here.
 - **Amount:** Enter the cost of each Additional Item next to the applicable field.
-  **Video Tutorial:** Learn how to add optional items like meals or materials to a paid registration. <https://www.loom.com/share/86695f55be1c40ca8057524ec24f81ee>



Live and Virtual Trainings

Create a Live Event

When **Live Event** is checked at the top of the page, the section Live Event Information displays below.

- **Start Date and End Date:** Select the event date and time. The current date and time displays by default.
- **Accommodations:** Select the accommodations available for the training/event. These will appear as options for registrants during registration.
- **Accommodations Notification Email:** Enter the email address that should receive the *Training Accommodation Notification* email when a registrant requests an accommodation.
 - If no email is entered, notifications are sent to the default email listed in System Configuration > Coalition Specific Info > Accommodations.

Create a Virtual Training

Virtual Event?: When Live Event is checked, the **Virtual Event?** box appears. Check this box for events held via **Zoom**, **GoToMeeting/Webinar**, or **Microsoft Teams**.

- A new section appears at the bottom of the event page to select the virtual platform information.
- **Virtual Event Information:** This section displays when **Virtual Event?** Is checked.
- **Virtual Event Type:** Select the platform where the virtual meeting will be created.
 - **Virtual Training Settings:**



- Checked-in attendees remain **In Progress** until all E-Learning lessons and quizzes are completed.
- **Completion:** Registrations move to Completed only after E-Learning completion.
 - Certificates become available (if enabled).

Version B:

Live or E-Learning Completion: A live session with a recorded version uploaded for continued access by live attendees and new registrants.

- **Build Course:** Build the course and add any resources or quizzes.
 - Keep the course **Inactive** during development.
 - **⚠ Note:** Content is not accessible until after the live session.
- **Activate the Course:** Activate the course from the **E-Learnings grid** to open registration.
- **Registrations:**
 - **Virtual Events:** Registrants receive the virtual link and custom registration emails.
 - **In-person events:** Registrants receive confirmation or custom emails.
- **During the Live Event:** Check in attendees.
 - **Checked-in** attendees move directly to Completed.
 - No-shows remain **In Progress** and retain access to online content through their Online Training Access Link.
- **Post Event Workflow:**
 - **De-activate the Course** from the E-Learnings grid to pause access.
 - Upload recordings, slides, and other resources.deactivate the course.
 - **Re-activate the Course** to restore access to registrants and gather new registrations.
 - Participants automatically receive a MailJet **Online Training Access Link**.
- **Post Live Event Access:**
 - Completed attendees can rewatch content.
 - No-shows complete the training asynchronously.
 - New participants can register later to access the recorded version.

 **Video Tutorial:** Learn how to set up and manage Live E-Learning using Version A or Version B. <https://www.loom.com/share/ca0dd5e6bd114b7196d9329341265fdc>

Design E-Learning Course

After the details of the course are created, you then can start to add Lessons and Resources. Build the course shell first, then add the **training content** (lessons, resources, quizzes).

Once the **Basic E-Learning Information** is saved, you will be directed to the **Design Dashboard**, where you can begin uploading resources and creating quizzes.

★ **SCORM Enabled Sites:** If Scorm is enabled for your site you will be taken to a page where you choose what type of training you are creating.

- **Coalition Manager Course:** Standard E-Learning with no SCORM content
- **Single SCORM File:** The entire course consists of one SCORM package.
- **Multiple SCORM Files:** SCORM packages are used throughout the course lessons, allowing a single course to include both SCORM and non-SCORM content.

E-Learning Design Page Icons

At the top of the Design Dashboard, there are several functions, some display depending on certain



configurations or actions.

	Preview	<p>Opens the course promo page to show how the course appears to participants, including the description, payment details, and registration link. Use this to test lessons after creating them.</p> <p>⚠ Note: Preview mode differs from the learner view. Quiz data is not saved, and lesson timers do not function.</p>
	Edit	<p>Opens the Basic Course Information page to update general course settings.</p>
	Duplicate	<p>Creates a copy of the course, including all basic information, lessons, quizzes, and resources. The duplicated course appears with the same name in Inactive status.</p>
	Archive	<p>This icon displays if any portion of the course has been archived.</p> <p>Click to view archived lessons or content.</p>
	Link	<p>Copies the course promo page link to your clipboard. Share this link to provide public access to course details.</p>
	Design Certificate	<p>Opens the certificate design page using the certificate image set in Training Details.</p>
	Approve/Deny Discussion Topics	<p>If a Course Discussion Board is enabled, Coalition Staff can use this page to approve or deny submitted discussion topics.</p>

⚠ Note: To organize lessons on the Design Dashboard, click the – or + icon to expand or collapse each lesson. Drag and drop lessons to rearrange their order. Collapsing lessons before moving them makes reordering smoother and more precise.

Add Course Lessons

After saving the Basic Information for an online or live online training, you are directed to the Design Dashboard. This is where you add lessons, upload resources, and create quizzes

🎥 Video Tutorial: Learn how to create lessons, set timers, enable discussion boards, and upload resources in an E-Learning course. <https://www.loom.com/share/leaf9f6f04364ef98ec0c0502a48b3a9>

- Click **Add Lesson** and complete the following fields:
- **Lesson Title:** Enter the title of the lesson.
- **Min Minutes:** (Optional) Enter the minimum number of minutes a participant must remain in the lesson before advancing or taking a quiz.
 - Leave at **0** if no time requirement is needed. During timed lessons, a countdown clock appears and participants cannot progress until minimum time has elapsed.
- **Max Participant Idle Time (must be greater than 5 min):** (Optional) Sets how long a participant can remain idle before being logged out. Idle means not opening lessons, clicking resources, or watching videos. When the participant is idle and approaching timeout, a warning message will appear about 2 minutes before log-out.
 - Leave at **0** to disable idle timeout, or enter a number greater than **5**.



- **Description:** Add lesson instructions or an overview. This text appears before lesson resources and supports formatting, hyperlinks, and images.
- **Has Discussion Board:** Select to allow participants to create discussion topics and post messages within the lesson.
 - **Discussion Posts Need to be Approved?:** Select to require staff approval before posts appear.
 - **Discussion Response Need to be Approved?:** Select to require staff approval before responses appear.
 - **Require Discussion Participation:** Select to require participants to post at least one message before continuing.
 - This requirement functions alongside other restrictions (e.g., minimum time or resource completion).

★ **Upload SCORM File:** Visible only for SCORM-enabled sites. Select this option to upload a SCORM package for the lesson. Choose the file from your device and click **Open** to attach it.

- **ScormFile:** Select the file from your device and click Open to attach it.
- ⚠ **Note:** The uploaded package must be a **SCORM 2004** package and must be compressed in **.zip** format.

★ SCORM File Overview

A **SCORM file** (Sharable Content Object Reference Model) is a standardized package created in educational design software such as Adobe Captivate or Articulate. SCORM content can include interactive lessons, quizzes, and media, and allows participant progress and scores to be tracked directly in CM. Using SCORM provides interactive, self-paced learning with detailed reporting on participant activity and completion.

There are two different ways SCORM files can be uploaded into lessons:

- **Single SCORM File:** Upload one SCORM package into a lesson to deliver the full course. This is the recommended method.
 - Participants launch the SCORM package from their CM Dashboard.
 - Completion is recorded automatically when they meet all SCORM requirements.
 - After finishing, participants return to the CM Dashboard to download their certificate (if applicable).
- **Multiple SCORM Files:** Build a hybrid course combining CM lessons and several SCORM packages.
 - Participants alternate between SCORM modules and CM-based lessons.
 - After each SCORM module, they return to the CM Dashboard to continue to the next step.
 - ⚠ **Note:** Using multiple SCORM files may increase monthly hosting costs, since each SCORM file counts as a separate participant registration.
 - **Example:** One course with four SCORM files counts as four registrations; a single SCORM file counts as one.

⚠ **Note:** The SCORM feature is an upgraded option and includes additional configuration and hosting fees. Contact CM Support for more information about enabling SCORM.

🎥 **Video Tutorial:** View how to create and manage SCORM-integrated courses, including setup options, participant experience, and reporting.

<https://www.loom.com/share/a38c8a8e7a134b40af67f02ff711a0db>



Add Resources to a Course

After saving the Lesson Information, you can begin adding resources. Resources form the main content of an E-Learning Course and can be viewed in pop-ups or downloaded by participants. Resources may include documents, videos, links, or interactive tools that support and enhance the lesson.

- Click **Add Resource**
- **Resource Type:** Select one of the following:
 - **File:** Upload a document for learners to view or download. Supported file types include PDF, Word (.doc/.docx), PowerPoint (.ppt/.pptx), video files (MP4/WMV), and images (.jpg/.png/.gif).
 - **File Name:** Select the file from your device or server.
 - **View Only**(do not allow download): Allows participants to view the file in their browser but prevents downloading.
 - **Disable Fast Forward:** Appears for uploaded video or audio files. Prevents fast-forwarding and requires participants to view or listen to the entire file before progressing.
 - **Closed Captioning:** Appears for uploaded videos. Upload a caption file in **.VTT** or **.SRT** format. Participants can enable captions while viewing.
 - **Link:** Paste a web link (<https://example.com>). Links open in a new browser tab. The system tracks that the link was clicked but not time spent on the linked page.
 - **Embed Code:** Paste an HTML embed code (e.g., `<iframe>`). This displays multimedia directly within the lesson, such as YouTube or Vimeo videos, Google Slides, or Loom recordings. A link field will auto-fill when the embed code is entered.
 - **⚠ Note:** If embedded content does not display, use the **Link** option instead. Some sites restrict external embedding.
- **Resource Title:** Enter a descriptive name for the resource. This displays under the thumbnail in the course.
- **Thumbnail Image:** Upload an image to accompany the resource. If no image is added, a default icon will appear based on the file type.
- **Instructions:** Enter any additional directions (e.g., "You must watch the entire video to mark this lesson as complete.").

⚠ Note: There is no file size limit. However, larger files may take several seconds to upload. Do not leave the page while the file is loading. Reach out to CM Support for assistance with uploading large files.

Additional Resources: Once saved, click **Add Resource** again to upload additional items for the same lesson.

E-Learning Video Best Practices

We recommend sharing the following instructions with participants before they begin an E-Learning video course, especially when **Disable Fast Forward** is enabled. These reminders help ensure the course timer tracks progress correctly and that participants receive full credit upon completion.

Suggested text to share with users:

"To make sure your progress is tracked correctly while watching this course:

- Keep this course window open so the Coalition Manager timer can track your progress.
- If you need to pause or leave, click the dark blue **Save Progress & Close** button on



the timer.

- Do not open the same course in two browsers or in two devices, such as your phone and computer at the same time — this will stop your progress from tracking.
- Avoid having multiple tabs of this course open. If you are not actively viewing or interacting with the screen, your progress may not be saved.”

 **Tip: Admin Override:** Admins can click **Admin Override** on the participant’s course access link for that specific video. This marks the participant as complete for that video.

Add a Quiz

- Click **Add Quiz** from the Design page
- **Quiz Type:** Select the Quiz Type
 - **Standard Quiz:** The most common quiz type, typically located at the end of each lesson to test participant knowledge. Results can be viewed through the **Summary Reports** section.
 - **Course Evaluation Quiz:** Creates a non-graded evaluation of the registrant’s experience. Regardless of which lesson it is created in, this quiz always appears at the end of the course after the final lesson. Completing the Course Evaluation Quiz signals course completion in Coalition Manager and allows the participant to download their Certificate of Completion, if available.
 - **Pre-Course Quiz:** Creates a non-graded quiz that appears before the first lesson, regardless of which lesson it is created in. Participants must complete the Pre-Course Quiz before starting the course.

Add Settings to Each Quiz

- **Settings for all Quiz Types:**
 - **Quiz Title:** Enter the quiz name (e.g., Lesson 1 Quiz).
 - **Randomize Questions:** Select this box to shuffle the question order for each participant.
- **Standard Quiz Settings:** All settings in this section are optional. Skip these settings for simple quizzes used only as checkpoints to move to the next lesson.
 - **Passing Score (%):** Set the minimum percentage of correct answers required to pass.
 - If participants do not meet the passing score, they must retake the quiz.
 - Quizzes can be retaken as many times as necessary.
 - Leave this at **0** if a passing grade is not required to continue.
 - **Quiz Length(mins):** Enter the number of minutes allowed for quiz completion.
 - This is often used for quizzes with open-ended questions to ensure respondents take the time they need to complete the quiz. They cannot move on until the questions are answered and the min quiz time has elapsed.
 - Leave at **0** for no time limit.
 - **Needs Approval:** Select Yes or No, if this quiz needs approval from your staff before progressing forward and passing the quiz.
 - The approval feature is especially useful for open-ended questions, allowing staff to review responses before learners move forward.

Add Questions to a Quiz

After the quiz type is saved, go to the Quiz Grid and click the **Questions** icon. Add questions as needed.

- Click **Add New**
- **Question Type:** Select the type of question.
 - **Free Text:** Participants type their response into a text box. Free text questions are not automatically graded nor included in the passing score unless approvals are enabled.



- **Question:** Enter the question.
 - **Answer Explanation:** (Optional) This text displays after submission.
 - **Multiple Choice Question:** Participants choose from a list of predefined answers.
 - **Question:** Enter the question.
 - **Answer Explanation:** (Optional) This text displays after submission.
 - **Add Answer:** Add response options and mark **Is Correct?** for the correct answer.
 - ⚠ **Note:** Only one answer can be marked as Correct.
 - ⚠ **Note:** For Course Evaluations with no correct answers, do not mark any answer as correct.
- 💡 **Tip: Duplicate Questions:** Duplicate questions when creating similar items to save time.
- 🧑 **Video Tutorial:** View a walkthrough of how to create and configure quizzes and evaluations, including quiz types, approvals, and participant view.
<https://www.loom.com/share/117520136e924c68a8e324c410047c41>
- See Section **Quiz Approval** for details on how to approve quizzes.

Inactive & Active E-Learnings

Inactive Courses: When E-Learning courses are first created, they are saved in **Inactive** status.

- Courses should remain **Inactive** until you are ready for participants to register and receive their **E-Learning Dashboard access link**.
 - While inactive, registrants will **not receive access** to the E-learning course materials.

Courses should always be **Inactive** when editing/updating course sections or resources. **Deactivate** an Active course from the Active grid, then go to the Inactive grid and edit the course as needed. Activate the course to make it live again.

Activate a Course:

Once all resources are added and testing and edits are complete, click the **Activate** icon on the Inactive Grid to make the course live.

- Activating the course opens the course for registrations, allows any previously registered learned access to the content again, and sends all registrants a **E-Learning Dashboard access link**.

E-Learning Promo Page

Each E-Learning has a Promo/Event Details Page. This page displays event details and provides participants with a registration link.

Promo Page Functions for Registrants:

- **Register:** Visible only during open registration dates and when access permissions are met.
- **Share:** Via email or social media
- **Google/Export Calendar:** Click the calendar buttons to add the event to your personal calendar.
- **Tags:** Click on any of the tags to find other trainings with the same tag.

Promo Details Page Functions for Coalition Staff:

- **View Attendee Counts:** View total registration counts, open the Registration Grid, or access registrant email addresses (click a registrant's name to open a new email).
- **Edit:** Update event details directly from the promo page.
- **Duplicate:** Creates an exact copy of the event to use as a template for a new one.



- **Design:** Design or edit the course.

Upcoming Events Search

The Upcoming Event Search page displays current and future trainings, events, and e-learning courses. Logged-in users and public visitors can use this page to explore upcoming opportunities.

How It Works

- Scroll through the list to view upcoming in-person, virtual, or e-learning events.
- Use the search filters to narrow results by title, topic, or date.
- Click the **Event Title** to open the **Event Promo Page** with full event details and registration links.
- Click each **E-Learning Category** to view courses grouped within that category.

Public Access Link: Coalition Admins can copy a link to the **Trainings/Events Search Page** in **System Configuration > Site-Specific Info** by scrolling to the bottom of the page. This link displays the public version of the Upcoming Event Search page and can be shared through your website, newsletter, or other promotional materials.

Event Data Summary

The Event Data Summary allows you to search all past, present, and future trainings and events, including E-Learning Courses, virtual sessions, and in-person trainings. This tool is useful for aggregating information about events that no longer appear on the Current Events grid because they occurred too long ago. To locate registrant or attendance information, use the **Attendance/Registration Summary** tile.

Use **Quick Search** to run searches using previously-saved filter criteria. Quick Search functions the same as selecting a **Saved Report**.

By default, searches include only active configurations. Archived dropdown items (and archived Coalition Staff) appear only when **Include ALL Configurations** is selected at the top of the Event Data Summary page.

Tip: This is the best place to gather training and event counts for grant reports. For registrant-specific data, use the **Registrations/Attendance** section.

Video Tutorial: Demonstrates how to search and filter events in the Event Data Summary view. <https://www.loom.com/share/27245a851241434e9ebaec4f7af4a3c7>

Note: Large data sets may take longer to load. Be patient when filtering thousands of events. You can print or export the report as displayed once results load.

Search Option criteria include:

- **Report Duration:** Select a time period. If you select *Time Period*, enter a date range. Leaving this blank searches all entries.
- **Training Type:** Select E-Learning (Asynchronous), Training Events (Live Events), default includes both.



- **Applicable Report Sections/Summaries:** Select specific sections if needed. No selection reports all sections.
- **Event Month**
- **Event Year**
- **Min and/or Max Hour:** Enter the minimum and/or maximum length of the training/event.
- **Event Type:** Select from the dropdown list.
- **Other Type:** Search by text entered when *Other* was selected as the Event Type.
- **Location Type:** Select from the dropdown list.
- **Other Location:** Search by text entered when *Other* was selected as the Location Type.
- **Event Title(s):** Search by keyword. *If multiple events, separate by commas*
- **Venue:** Search by location or venue.
- **Keyword(s):** Search keywords in the training title, description, or notes. Separate multiple words by using a comma.
- **Content Area Group, Content Area Item, and/or Other Content Area Item:** Select from the dropdowns or type into the field.
- **Funding/Grant Source(s):** Select one or multiple funding sources that were used to provide the training.
- **Organization Trainer:** Select from the dropdown list
- **Non-Coalition Staff Trainers:** Select from the dropdown list
- **Is Billed:** Filter for billed events or not billed events, default includes both.
- **Has Workshops:** Select events with or without workshops, default includes both
- **Has Registrations:** Select events with or without registrations, default includes both
- **Workshop Title:** Search by keyword in workshop titles.
- **Access:** Select from the dropdown to filter by Access Level(s).
- **Contact Type, Contact, and/or Contact Staff:** Narrow down as much as needed by selecting from the dropdown menus.
- **Has Single Fee:** Select events with Single or Multiple Fee Options, default includes both
- **Min/Max Fee:** Filter by a range of fees.
- **Occupation:** Filter by attendee occupation/discipline.
- **Custom Training/Event Fields:** If Custom Questions had “Include in Search Filter” selected, they will be filter options here.

Event Data Summary Reports

⚠ Note: Most summaries use the **registration created date** to determine inclusion. Reports based on attendance or completion, such as Attendee Count, use additional criteria, which may cause totals not to match across summaries when a date range is applied.

The following reports are generated:

- **Training Events:** Displays all synchronous events with start dates in the selected range and all e-learning courses with registration open during that range. Attendance count reflects participants who attended within the filtered dates.
- **Events Summary by Registrations:** Displays counts of registrants and attendees created within the filtered range.
 - **Total Registration:** Registrations created within the selected date range that were approved (if required) and not canceled or archived.
 - **Attendee Count:** Registrations created within the selected date range where the training was also completed within that same range.
 - **Waitlisted:** Registrations created within the selected date range that are on a waiting list.
 - **Canceled:** Registrations created within the filtered range that were cancelled.
 - **E-Learning in Progress:** Registrations created within the filtered range where the e-learning is in progress (not yet completed), not expired, and not waitlisted.



- **Events Summary by Type:** Counts of events grouped by Event Type.
- **Events Summary by Location:** Counts of events grouped by Location Type.
- **Events Summary by Contact Type:** Counts of attendees who attended by Contact Type access. Coalition Staff and General Public attendees are counted as **Other**.
- **Events Summary Access Level:** Counts of events grouped by Access Level.
- **Events Summary Organization Trainers:** Displays training hours and funding sources attributed to Organization Staff trainers.
- **Events Summary Non-Organization Trainers:** Displays training hours and funding sources attributed to Non-Organization Trainers.
- **Events Summary Occupation:** Displays attendee counts and total training hours by occupation.
 - *Example: Two Advocates attending three 1-hour trainings displays Count: 2, Hours: 6.*
- **Events Summary Event Occupation Summary:** Counts of checked-in attendees by selected occupation.
- **Events Summary Summary by Accommodation:** Counts of checked-in attendees who requested accommodations.
- **Events Summary Attendee Releases:** Counts of checked-in attendees who agreed to release statements.
- **Events Summary Publication Information:** Counts of publications distributed, grouped by Publication Title.

 **Tip: Export Events Summary - Training Events Grid:** When exported to Excel, event names remain clickable hyperlinks. Selecting the event title in the exported file opens the event's page in Coalition Manager.



Current Series

The Training Series feature is an optional function that can be enabled on your CM site by CM Support. This feature allows you to create multiple events within a single series, such as monthly webinars or recurring sessions. The series setup allows registrants to register for multiple dates at the same time instead of signing up for each event individually.

 **Video Tutorial:** See how to view and manage your training series from the Current Series grid. <https://www.loom.com/share/bdf4f0f352b2464abc20792c5a89ec5e>

Current Series Grid

The Current Series Grid displays summary information for each training series.

- **Series Title:** The title of the Series. This title appears before each event title on the promo page (Series Title: Event Title).
- **Start Date:** The start date of the earliest event in the series.
- **End Date:** The end date of the latest event in the series.
- **Number of Events in This Series:** Total number of events included in the series.
- **Unduplicated Attendee Counts:** The total number of unique participants who were checked into at least one event in the series. Each participant is counted once, even if they attended multiple events. Only attendees marked as **Checked In** are included.
- **Events in the Series:** A list of all events within the series, shown with hyperlinks for quick navigation.

Current Series Grid Icons



	Link	Copies the promo page link for the entire Series to your clipboard. Share this link to provide public access to event details.
	View	Opens the Series Promo Page.
	Duplicate	Creates a copy of the series, including all events and settings.
	Add Event	Opens a new event page to create an additional event within the series.
	Remove Event	Opens a pop-up listing all events in the series. Click Remove Event to archive the selected event.
	Edit	Opens the Series Details page for editing.
	Archive	Archives the entire series and all associated events.

Duplicate a Series

Duplicating a Series creates an exact copy of the original Training Series, including all events and settings.

After selecting **Duplicate**, you are taken to the Series Details page to review and confirm settings. You will then be directed to each individual event page to confirm details. Edit the Basic Information such as the title, dates, and any other relevant fields. The only setting that must be resaved for duplicated events is the Virtual event setting. Click **Save** to move through each event in the duplicated series and update information as needed.

When duplication is complete, the new series appears with all the same settings as the original. The word **“Duplicate”** is temporarily added to event titles for easy identification until edits are finalized.

 **Video Tutorial:** Learn how to duplicate an existing Training Series and edit the new copy.
<https://www.loom.com/share/e3a8fa03b0c240c084b4ee6b58446c48>

Create a Series of Events

There are two ways to create a new series:

- **From New Training Event:** When Training Series is enabled, click New Training Event and choose **Series of Events**.
- **From the Current Series Grid:** Click Add New to begin creating a new series.



Customization and Responsive Page Setup

The New Series page is responsive. Some sections and fields update automatically based on your selections, for example, Has Registrations or Has Registration Fee.

Building a series follows the same general process as creating a single event, except you first set up the basic series information, then create each event one by one, based on the event date.

⚠ Note: Because the page layout adjusts dynamically, this handbook organizes fields by category rather than on-screen order for easier setup and reference.

Always Visible Event Creation Fields

Add Basic Series Information:

- **Series Title:** The title of the series. This title appears before each event title on the promo page (Series Title: Event Title).
- **Series Description:** Enter public event details that display on the promo page. Supports formatting, images, and hyperlinks.
- **Promo Image:** Displays on the promo page for the series. Each event can have its own promo image, as well.

Registration Enabled Settings and Fields

When **Has Registration Information?** is checked, additional options appear. These settings control how participants register for the event and what information is collected.

- **Has Registration Information?:** Check this field when collecting registration information.
- **Has CEU?:** Select this option if participants should receive the same CEUs for attending each event in the series.
 - **CEU Information:** Section displays when **Has CEU?** Is checked.
 - All events in the series award the same CEU value.
 - If you want to award different CEUs for each event, or issue CEUs only once (for example, at the end of the final session), leave **Has CEU?** unchecked.
 - **Example:** If Has CEU? is selected, 3 CEUs are entered, and three events are held, a participant who attends all three events receives a total of 9 CEUs.
 - Click **Add CEU:** Select from the list of available CEUs and enter the number of hours awarded. Designated CEU options display on the Training Registration Form.
 - CEU options are created in System Configuration > Trainings/Events > CEU
 - **Hours Offered:** Enter the number of hours awarded for each CEU type. The CEU type and number of hours awarded automatically appears on Certificates of Completion when applicable and when the CEU field is included on the certificate layout.
 - Click **Add CEU** as needed to offer multiple credits types.
- **Is Registrant Approval Required?** Check this box to require your staff approval before registrants are added to events in this series. When enabled, a **Needs Approval** tab appears in each event's **Registrations Grid**. Only approved registrants will receive confirmation emails and virtual join links.
 - **Series Registration Approval Notification Email - All Events:** Enter staff email address(es) to receive notification when a registration needs approval. Separate multiple addresses with commas.
 - **🎥 Video Tutorial:** Learn how to enable and manage the registrant approval process for



your events, including how to review, approve, or deny pending registrations.

<https://www.loom.com/share/3e06d59108044bcb95cc5939ba211bc9>

- See the **Training Management Manual** for additional details
- **Disable Group Registration:** Check this box to remove the group registration option for this specific event.
 -  **Video Tutorial:** Learn how to disable group registration for a training or event. <https://www.loom.com/share/04f359c48dc84eeb95a74086c5c5d91c>
- **Registration required for all events?** Leave unchecked if registrants should be able to select individual events. If checked, registrants will be registered for ALL events.
 - Events that have already occurred will not appear on the registration page.
 -  **Tip:** Ensure all registrations close at the same time when registration is required for all events.
- **Custom Registration Email?:** Check this box to create a custom confirmation email that registrants will receive upon registration for any event in the series.
 - If this box is not selected, registrants automatically receive the default transactional **Registration Confirmation Email** from MailJet.
 - This email is sent in addition to any virtual join link information if events are virtual.
 -  **Note:** You can also send additional enrollment confirmation emails for each event in the series. Be mindful of how many confirmation emails are enabled to avoid confusion.

Set Access Levels

Select who can view and/or register for the training. Defaults to Only Staff when creating.

- **Open to All:** Anyone can view the promo page, and anyone can register. The promo page appears on the **Upcoming Events** public page and for logged-in users. Events can also be shared to anyone by link.
- **All Contact Types with Login:** The promo page appears on the **Upcoming Events** public page, but only logged-in contacts can register.
- **Specific Contact Types with Login:** The promo page appears on the **Upcoming Events** public page, but only selected Contacts can register.
 - **Add Specific Contact:**
 - **Contact Type:** Select the Contact Type(s) who should have access.
 - If no specific Contact or Contact Staff restrictions are added, *all contacts within this Contact Type will have access.*
 - **Contact:** Select a Contact Individual or Organization to narrow access.
 - If the Contact is an organization and no Contact Staff are selected, *all Contact Staff under that organization will have access.*
 - **Contact Staff:** Select specific Contact Staff (if applicable) to further restrict access to only those individuals.
- **Only Staff:** Limits viewing and registration to your Coalition's staff. Commonly used for in-service or internal trainings.
- **Specific Staff:** Restricts access to designated staff members. Commonly used for in-service events for select staff.
- **Specific Access Groups/Committees:** Restrict registration to selected Access Groups/Committees.
- **Link Only:** Invite-only access. Promo page does not appear on the dashboard when logged in, but anyone with the link can view and register.

Events with Registration and Fees

Has Regular Fee Information: Check this box to collect and manage event fees. Checking this box opens additional fee sections on the Event Details page.



- **⚠️ Note:** All events in the series use the same registration fees, regardless of how many events a participant attends. If fees are added at the series level, options to set up fees for individual events are not available.

👤 Video Tutorial: Learn how to enable registration fees, set attendee pricing, and add discount codes. <https://www.loom.com/share/a2001178f9bb4fc2b9e393ab31940d6c>

Designate Attendee Types

Create groups of registrants that pay specific fees (for example, Members, Non-Members, or Sponsors). Select the applicable Attendee Types and assign their fee structures.

Attendee Types can be restricted to users who are logged in or belong to specific Contact Types. Attendee Types are created in *System Configuration > Trainings/Events > Attendee Type*.

Attendee Types: If event fees vary by type, select the applicable options from the dropdown list. Each selected type appears in the Fee Information section as a separate pricing option.

- **⚠️ Note:** If none are selected, all types are visible when setting fees by Attendee Type.
 - **Everyone (with or without login):** Anyone can view and select this Attendee Type and its associated fee.
 - **Contact Types:** Only selected Contact Types can view and select this fee. They must be logged in and belong to that Contact Type.
 - **Only Coalition Staff:** Only your organization's logged-in staff can view and select this Attendee Type and its fee.
 - **Everyone with login:** All logged-in CM users can view and select this Attendee Type and its fee.
- **👤 Video Tutorial:** Learn how to create and select Attendee Types with different fee levels for training and e-learning events: <https://www.loom.com/share/84f57128d6c94fa6ac508cc8ef9dacc8>

Set Up Regular Fees for a Series

Regular fees are the base fee for a series. If Early Registration is enabled, Regular Fees go into effect after the Early Registration Period Ends.

- **Payment Method:** Select which payment methods are available for the event. If none are selected, all methods apply.
 - **Online:** Connects to the payment processor for credit card or ACH transactions.
 - **⚠️ Note:** Only a Payment Method named **"Online"** connects to credit card or ACH processing. Ensure a method with this exact name exists in *System Configuration > Trainings/Events > Payment Method*. Changing this terminology will disable the online payment processing setup.
 - **Offline Payment:** (e.g., check, pay at event) created in System Configuration require staff to later mark registrants as paid in the registrations grid. Registrations are collected even if payment is not completed at sign-up.
 - **⚠️ Note:** With offline payment, registrants remain **unpaid** and **incomplete** until staff update payment; certificates (if applicable) are not sent until paid.
- **Fee Structure:** Select the type of payment structure:
 - **One Fee for All:** All registrants pay the same fee.
 - **Total Registration Fee:** Enter the fee for the event.
 - **Multiple Fees by Attendee Type:**
 - **Rows:** A row displays for each Attendee Type.
 - **Columns:** A row for Entire Fee displays. If Flexible Attendance was selected, a column will display for each day to create an individual day cost.
- **🔧 Accounting Code:** Select an accounting code for this event.



Set Up Early Registration for a Training/Event

- **Early Registration Information?:** Check this box to display fields for defining the early registration period and fee structure. This can be used to incentivize early registration or penalize late registration.
- **End Date:** Autofills with the event date. Select the final date of early registration. After this date, the regular fee applies.
- **Fee Structure:** Choose **One Fee for All** or **Multiple Fees by Attendee Type**. The setup matches the regular fee structure described above.

- Early Registration Information

Fee Structure *	Total Registration Fee *	End Date *
One Fee For All	\$0.00	9/16/2025

Create a Discount Code or Reduced Group Rate

If Discount Codes or Reduced Rates are added here All Events in this Series will have the SAME Discount and Scholarship Codes.

- Click **Add Discount Code and Reduced Group Rates**
- **Discount Code Type:** Select the type of discount: **Regular** or **Group**.
 - **Regular Discount:** Attendees enter a code during registration to receive the discount.
 - **Discount Amount Type:** Choose how the discount is applied:
 - **Percentage:** Applies a percentage off the total fee.
 - **In Dollar:** Applies a flat amount off the total fee.
 - **Discount Code Name:** Internal name for staff reference.
 - **Discount Code:** The exact code registrants must enter to receive the discount.
 - **Discount Amount/Percentage:** Enter the percentage or dollar amount to reduce from the total registration fee.
 - **Apply Discount On:** Choose which portion the discount applies to:
 - **Registration Only**
 - **Additional Items Only**
 - **Both**
 - **Group Discount:** Automatically applies when registrants use the group registration and meet the applicable number of participants.
 - **Minimum and Maximum Participants:** Define the participant range for each group discount.
 - **⚠ Note:** Do not overlap number ranges when creating multiple group discounts.
 - **Discount Amount Type:** Choose how the discount is applied:
 - **Percentage:** Applies a percentage off the total fee.
 - **In Dollar:** Applies a flat amount off the total fee.
 - **Discount Amount/Percentage:** Enter the percentage or dollar amount to reduce from the total registration fee.
 - **Apply Discount On:** Choose one of the following:
 - **Registration Only**
 - **Additional Items Only**
 - **Both**
 - **👤 Video Tutorial:** Create various codes for registrants to access reduced rates.
<https://www.loom.com/share/571d838f69ec44b989a90d9a3d49b0bc>

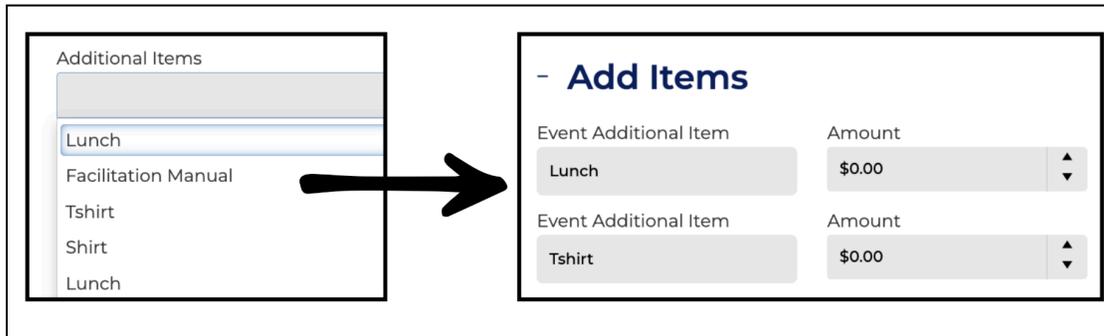
Add an Additional Fee

Optional, fee-based items such as meals, t-shirts, or manuals can be added to a registration so attendees can purchase extras during checkout. These items must first be created in System Configuration > Trainings/Events > Additional Items. When registrants complete their registration, they can select which



add-ons to purchase. The total cost automatically updates to include the selected items.

- **Has Additional Fee?:** Check this box to display the Additional Items section and the Additional Items Field.
- **Additional Items (Field):** Appears early on the page under Accommodations and Attendee Type. Select the items you would like to offer for this event.
 - The selected item(s) will appear lower on the page in the Additional Items section.
- **Additional Items (Section):** Each additional item selected earlier will display here.
 - **Amount:** Enter the cost of each Additional Item next to the applicable field.
- **👤 Video Tutorial:** Learn how to add optional items like meals or materials to a paid registration. <https://www.loom.com/share/86695f55be1c40ca8057524ec24f81ee>



Create Events within the Series

After saving the Basic Information for the series, add each event individually. Enter event-specific details such as the **title**, **date**, and any additional information. For guidance on individual event fields, see section **New Event** above.

⚠️ Note: Some settings for events in a series are already defined in the series setup, so some fields will not appear when creating each event.

Current Events

The Current Events grid includes optional columns that can be added or removed using the column selector. These fields help you view event details at a glance and customize the grid to your reporting needs.

💡 Tip: To view events older than six months, use the **Event Data Summary** search.

⚠️ Note: Events archived for over one year no longer appear in the Archived Events tab.

👤 Video Tutorial: Learn how to navigate and manage trainings using the Current Events grid. <https://www.loom.com/share/974f5f895ba04787ab857c051d861ed5>

Current Events Grid

The Current Events grid displays the following functions and information for each Training/Event. Available column options include:

- **Title**
- **Start Date**
- **End Date**
- **Virtual Event Type:** Displays whether the event is a Zoom or GoToMeeting/Webinar. This



information is automatically pulled when **Create as a Virtual Training** is selected during event setup.

- **Virtual Meeting ID:** Shows the Meeting ID imported from your connected virtual platform (Zoom or GoTo) after the event is created.
- **Is Series Event**
- **Max Attendees Count**
- **Event Address**
- **Training Hours**
- **Training Access**
- **Publication Information**
- **Content Areas**
- **Event Trainers**
- **Event Trainers Billing Info**
- **Funding Sources**
- **Workshops**
- **Event Types**
- **Location**
- **CEU**
- **Tag**
- **Custom Training Fields:** Questions must have had “Display in Grid Column” selected.

Current Events Grid Icons

	Copy Link	Copies the Training/Event Promo Page link to your clipboard so it can be shared with others.
	Preview	Opens the Training/Event Promo Page. Promo pages include the event description, payment details, and registration options.
	Edit	Opens the training or event details page for editing.
	Copy Teams JoinLink	Displays when an event is hosted in Microsoft Teams. Click to copy the Teams join link for sharing with registrants.
	Archive	Moves the event to the Archived tab in the Current Events grid. This removes it from searches and disables registration.
	Registrations	Opens the Registrations Grid, which lists all active, pending, waitlisted, archived, and canceled registrants and their details. See the Manage Event Registrations section for more information.
	View/Arrange Registration Questions	Allows you to preview the registration form from a participant's perspective and rearrange the section order.
	Additional Questions	Add custom questions for this specific event. Custom questions function the same way as questions created in the Custom Forms module. ⚠ Note: This icon is only visible before the event start date. Once the



		<p>event begins, it no longer appears.</p> <p>⚠ Note: Custom registration questions that apply to all events within an Event Type can be created in System Configuration.</p>
	Occupation Count	Manually add the number of attendees by occupation. Used only when additional occupations need to be recorded that were not captured during registration.
	Duplicate	Creates a complete copy of the event with the same settings and details.
	Evaluation Summary	Visible when a Custom Forms survey is attached to the event. Opens a summary of responses submitted through the evaluation notification link. For broader reporting or filtered results, go to Custom Forms > Form Search .

Add Custom Registrations Questions

Custom registration questions can be added to individual events to collect additional information from registrants beyond the standard registration fields.

Add Questions

From the Current Events grid, locate your event and click the **Questions** icon in the corresponding row. This opens the event-specific registration questions builder.

Build Questions

Add a section, enter a section title, then add the questions you want registrants to complete. Question setup follows the same process used for Custom Forms.

⚠ Note: The Questions icon only appears for active or upcoming events. Once an event has passed, event-specific registration questions can no longer be edited.

💡 Tip: Refer to the Custom Forms section for detailed instructions on building question types and formatting responses.

🎥 Video Tutorial: Add custom registration questions for a specific event.

<https://www.loom.com/share/a49c7b7f7c2649b99899153ff95417bb>

Export Excel with Links to Events

When you export the Current Events grid to Excel, event titles remain clickable hyperlinks. Selecting an event title in the exported file opens the event's page in Coalition Manager.

Registrations Grid - Trainings/Events

From the Current Events page, you can click the **Registrations** icon to access multiple actions for the event. This is where many key tasks for managing the event take place.

Grid Tabs: The Registrations Grid displays all registrants for the event and organizes them into tabs:



Active, Waiting, Canceled, Needs Approval (if enabled), and **Archived**.

Registrations Grid Actions

The top of the grid contains links and functions used to manage the event. Some functions appear only after the event has been completed. Depending on the event settings, the following functions may be visible:

Send Surveys to Attendees

After the training start date—and if a **Custom Forms** survey is linked to the event—you can send surveys directly to participants from the **Registrations Grid**.

- Two links appear above the grid. Click the appropriate link to send the survey email in bulk.
 - **Send survey to everyone who checked in**
 - **Send survey to those who haven't completed it yet.**
- **⚠ Note:** The survey email contains a unique coded link tied to each registrant. When completed, the attendee's record is automatically updated—no manual tracking required. **Do not forward or share survey links manually.**
- **🎥 Video Tutorial:** Learn how to send follow-up surveys to attendees and automatically track evaluation completion. <https://www.loom.com/share/b923b2c38b104188b3fc11c047e56aa0>

Send Certificates of Completion

If a certificate is enabled for the event, a link reading “Click here to send certificates for the event” appears above the Registrations Grid after the training start date and time.

- Click the link to email certificates to all registrants who are marked **Checked In**.
 - **⚠ Note:** Certificate emails are sent to checked-in attendees even if completion requirements are not yet met. If an attendee clicks the certificate link before completing all required steps (such as surveys or fees), they are taken to a page that instructs them to complete the remaining requirements before the certificate can be downloaded.
- Certificates are auto-filled with event and attendee details.
- Attendees can also access and download certificates by logging into Coalition Manager.
- **⚠ Note:** If a survey is required for completion, the certificate email sends automatically after the survey is completed—no manual send is needed.
- **💡 Tip:** Certificates can also be sent individually by clicking the **Send Certificate** icon in the Registrations Grid.

Send the Completion Email to All Attendees

If Custom Completion Emails are set up in Event Details, links appear above the Registrations Grid after the event date and time have passed.

- **Send to everyone who attended:** *Click here to send confirmation email to everyone who has checked in.*
- **Send to all registrants (even no-shows or cancelations):** *Click here to send an email to everyone who registered.*
- **Send to registrants who did not complete:** *Click here to send email to everyone who registered but canceled or did not complete.*
- **⚠ Note:** The completion email links do not appear until the event date and time have passed.

Download Certificates

Appears for courses with certificates enabled. Clicking this button opens a single PDF containing certificates for all checked-in participants.

- **⚠ Note:** Downloading certificates does not email certificates to registrants. Use this option to print, preview, or download certificates only.



- **⚠ Note:** If no registrants have been checked in, one default certificate displays with placeholder details.

Import Registration

Use **Import Registrations** to add multiple participants to an event using an Excel template. This is helpful when registration was collected outside of CM.

- Click **Import Registration** and download the Excel template.
- Enter each registrant's email address, first name, last name, and any additional information. **First name, last name, and email address are required fields.**
- Save the file in your device, then upload it to CM.
 - **⚠ Note:** Files must be saved in Excel format.
- Imported registrations connect to existing Training Profiles when the same email address is used.
- **Importing before the event:** Registrants receive the confirmation email and any scheduled reminder or follow-up messages.
- **Importing after the event:** The system prompts you to mark registrants as Checked In and confirm fee payment so their training record is marked complete.
 - **⚠ Note:** Registrants imported for past events do not receive confirmation emails.
- **🎥 Video Tutorial:** Learn how to import registrations using the Excel template. <https://www.loom.com/share/698c50eb3c59435a80be93b0326ade12>

Cancel Event

The **Cancel Event** function allows Coalition Staff to cancel an event and notify all registered participants.

- Click **Cancel Event** to begin. A pop-up box appears with the option **Email All Registrants:**
 - **Checked:** Enter the sender email, subject, and message body to notify participants. Messages can include links, images, or attachments, similar to other custom emails.
 - **Unchecked:** The event will be canceled without sending any notification.
- **Canceled Tab:** Once canceled, the event moves to the Canceled tab in the Current Events grid. You are taken to a refreshed Registrations Grid for that event, and all registrations are moved to Canceled. You can still open the grid to view registrant details or send follow-up communication. **Canceled Zoom Events:** If the event is linked to Zoom, registrants automatically receive a Zoom cancellation notice.
- **🎥 Video Tutorial:** Learn how to cancel an event and use the cancellation email feature to notify registrants. <https://www.loom.com/share/8128391259034b28a593326253fa72ff>

Email Group

Use **Email Group** to email all registrants—or a filtered selection—from your default email program (Outlook, Gmail, Apple Mail, etc.).

- Filter or sort the Registrations Grid to the group you want to contact.
- Click **Email Group**.
- Your default email program opens with a new draft message, and all selected email addresses appear in the **BCC** field.
- If your email system limits BCC recipients, a **Copy All** option appears so you can paste the addresses manually.
- This tool does **not** add contacts to any mailing list in your EMS.
- Best used for small or informal outreach.
- **⚠ Note:** For large recipient groups, use your organization's connected email marketing system instead of Email Group.
- **🎥 Video Tutorial:** Learn how to email selected registrants using the Email Group feature. <https://www.loom.com/share/b26f82d2c2bd4752b76d403d929568df>



★ Send Text Messages

Select Text Message to send an SMS to any phone number that has opted in to receive text messages.

- The Event Registrations Grid displays **Yes/No** in the **Is Text Opt In** column to indicate which registrants will receive text messages.
- Training Attendee profiles can be edited to opt in or out of text messaging.
- After you click the Text Message button, enter your message in the **Body** field, then review and confirm before sending.
-  **Note:** Text messages send to anyone on the grid who opted into text messaging. Any filters applied to the grid are not honored during export. The export will include all records in the grid, not only those shown by the filter.
-  **Video Tutorial:** View how to send text messages through Coalition Manager: <https://www.loom.com/share/ce31ffe7a76b4a548063ce1974328d7c>

Export Attendees Emails as Group

Creates a one-time mailing list in your **Email Marketing System (EMS)**. This list will only exist in your EMS and will not automatically update from Coalition Manager.

-  **Note:** Selecting an existing list during export completely replaces that list. Grid filters are not honored—the export includes all records in the grid, not only filtered results.
-  **Video Tutorial:** Learn how to export contact and staff emails to your connected EMS for one-time campaigns. <https://www.loom.com/share/582e25db92b64ea7b10a910b54a6cbe5>

Add to Mailing Lists

Add selected contacts or staff to one or more existing mailing lists. These lists were created in your CM System Configuration and are used on a more regular basis.

-  **Note:** You must select an existing list. All records in the grid are added if not already included. Existing list members are not removed or replaced. Grid filters are not honored, the export includes all records in the grid, not only filtered results.
-  **Tip:** Use **Add to Mailing Lists** for ongoing, auto-updating lists, and **Export to EMS** for one-time messages or event announcements.

Add to Access Group

Select from the dropdown list to add selected registrants to an Access Group.

-  **Note:** Only registrants who are system users (in a Contact Type with system access) can be added to an Access Group or Committee. Registrants without system access are not added.

Sync Check-In & Generate Report

For Zoom or GoToWebinar events, attendance data and detailed participation records can be automatically pulled and reviewed after the event ends.

Sync Check-In

- Click Sync Check-In to import attendance from the connected virtual platform.
- CM automatically marks attendees as **Checked In** based on their join records.
- This button appears in the Registrations Grid only after the event has ended.

Generate Report

- After syncing, click Generate Report to view detailed attendance data, including join time, leave time, and total duration.
- The report includes all people who joined the virtual event, even if they did not register in CM.



Use this report to verify attendance and manually uncheck anyone who did not meet your organization's attendance policy.

⚠ Note: Attendance is marked only from the platform data. Even participants who joined for one minute will appear as attended.

💡 Tip: Attendees must use their **individual Join Link** for Sync Check-In and Generate Report to work. General/shared links do not track join or leave times.

👤 Video Tutorial: Learn how to sync attendance from Zoom or GoToWebinar and verify check-in results. <https://www.loom.com/share/ed820d25ae024cdebc177bb346354869>

Registrations Grid Column Options

Not all of these will display, based on your system's configuration and specific details for the event.

- **Registration ID**
- **Attendee Name**
- **Organization**
- **Email**
- **Phone**
- **IsTextOptIn**
- **Occupation**
- **Job Title**
- **Accommodation**
- **Accommodation Detail (if none, please leave blank)**
- **Attendee Releases**
- **Attending Entire Conference**
- **Training Attendance Dates**
- **Workshops**
- **Payment Method**
- **Attendee Type**
- **Attendee Address**
- **Attendee City**
- **Attendee Contact Type**
- **Attendee Zip**
- **County**
- **Attendee State**
- **Date Registered**
- **Attended Training**
- **Is Registration Fee Paid**
- **Is Certificate Sent**
- **Certification ID**
- **Is Group Registration?**
- **First Name**
- **Last Name**
- **Pronoun**
- **Is Evaluation Email Sent?**
- **Discount Codes and Reduced Group Rates**
- **Custom Registration Questions:** Must have Include in Grid Column Option to display



Registrations Grid Icons

	Detail	View the details for the registration (payment, registrant info, etc.)
	Edit	Edit the person's registration information.
	Archive	Moves registrant to Archived tab. No notification of cancellation will be sent to the registrant. No payment refund is made.
	Check in/ Uncheck	Manual check in or uncheck a registrant.
	Cancel Registration	Cancel registration: This will move the registrant to the Canceled tab and they will receive a notification of cancellation. Cancelling Paid Registrations: Cancelling a Paid Registration will automatically refund an online payment if your System is using Stripe. Any cancellations with other payment processors need to be manually refunded. Archiving a registration does not send a refund.
	Individual Invoice/ Group Invoice	Click the invoice icon to download a PDF of the training invoice. If the registrant was part of a group registration, both an Individual Invoice and a Group Invoice icon will appear. Each paid training or eLearning registration generates a unique invoice number. After payment is processed, the invoice number appears in the Payment Log and can be added as a visible column in Combined Reports → Payment Log for easier tracking.
	 Pay Online	Click here to pay the training fee via credit card or bank transfer.
Fee Received	Fee Received	Click here to enter payment details of an offline payment once it is received.
	Transfer	Replace this registrant with a new attendee. The original registration is canceled and the new person takes their place.
	Copy Virtual Link	Copy the participant's unique Join Link so that it can be emailed to them, if they need it again. (This link is also available to users who view their Training Attendee data.)
	Survey Completed	Click this icon to indicate that the attendee has completed the post-event survey. Because surveys are anonymous, you cannot view which specific survey response belongs to the attendee. When an attendee completes the survey using the link in the survey email or when Coalition Staff manually select this icon, Survey



		Completed is displayed.
	Incomplete	This icon appears when a survey was previously marked as completed but needs to be reverted. Click the icon to return the attendee's survey status to Incomplete.
	Move to Waitlist	Moves the registrant to the waitlist and sends a waitlist confirmation email.
	Upgrade	Moves a registrant from the waitlist to Active and sends all standard registration confirmation emails.
	Download Certificate	Click to download an auto-filled Certificate of Completion containing this participant's course information. This icon displays only if the event has a certificate and the registrant has been checked in. If a survey is required for course completion, the icon does not display until the survey is completed.
	Send Certificate	Email the certificate to a registrant who has a Completed status. This icon displays only if the event has a certificate and the registrant has been checked in. If a survey is required for course completion, the icon does not display until the survey is completed.
	Send Survey	Send the survey again to this participant only. This icon is only visible if the event has a survey and if the registrant has been checked in.

⚠ Note: Completed Training Registrants

A registrant is marked **Completed** when all course requirements are met. Requirements include:

- The registration fee is paid, if applicable.
- All required surveys or evaluations are submitted, if applicable.
- The registrant is marked as attended and, for eLearning courses, has completed all lessons, quizzes, and acknowledgments within the course.

Registration Approval

Use Registrant Approval when you need to review and authorize registrations before participants are added to the event. This feature is helpful for invitation-only events, limited-capacity sessions, or trainings that require eligibility checks.

🎥 Video Tutorial: Learn how to enable and manage the registrant approval process for your events, including how to review, approve, or deny pending registrations.

<https://www.loom.com/share/3e06d59108044bcb95cc5939ba211bc9>

Events with Approval Enabled: Events must have **Is Registrant Approval Required?** checked in the Event Details page.

Registrations Grid – Needs Approval Tab: When enabled, a Needs Approval tab appears in the



Registration Grid. All new registrants are added to this tab until reviewed.

- **⚠ Note:** If Coalition Staff or Coalition Admins register someone manually, they bypass the approval process and are added directly to the Active list.

Approval Process:

- **Participant Registers:** The registrant receives a **Training Approval In Progress** email confirming their registration is pending. They do not receive the event confirmation or Zoom details until approved.
- **Staff Notification:** If an email address is listed in the Event Registration Notification field, staff will receive a **Registrant Approval Admin Notification** showing who registered, with a link to open the registrant's details.
- **Reviewing Registrants:** Staff can click a registrant's name to view their full registration details, email them from the grid if clarification is needed, and leave internal notes before taking action.
- **Approve or Deny:** Staff approve or deny the registration from the grid or from the registration detail page.
 - **If Approved:** The registrant moves to the **Active** list and receives the standard Registration Confirmation, followed by any custom confirmation or Zoom link emails.
 - **If Denied:** The registrant receives the **Denial Notification Email** with the note included.

💡 Tip: For multiple pending registrations, staff can use **Bulk Approve** to move all selected registrants to the Active list at once. All approved participants receive the standard confirmation and follow-up emails automatically.

Group Registration

Group Registration allows one person to register multiple attendees for the same event in a single submission. Any event with registration enabled (one-time events, Training Series, and E-Learning courses) will display both **Single Registration** and **Group Registration** when you click **Register**.

💡 Tip: If you do not want group registration for an event, select **Disable Group Registration** on the event creation page.

Person Registering the Group: The group organizer completes the registration for all attendees. For each participant, they enter all required fields, answer custom registration questions, and select accommodations as needed. After each person is added, the organizer can:

- View a list of everyone already added
- See when event capacity has been reached
- Archive anyone added by mistake

Each attendee added through Group Registration is treated as an individual registrant for capacity, waitlists, certificates, and emails.

Group Discounts: Group Discounts automatically reduce fees when multiple attendees register together. Discounts are configured in **Event Details** when **Has Registration** and **Has Registration Fee** are enabled. Discounts apply automatically when the group size falls within the configured range. Discounts can be a flat amount or percentage.

Payment and Group Invoice: If the event has fees, the payment screen displays:

- Total number of registrants
- Total fees for the group



- Any Group Discount applied
- Optional Discount Code entry (if enabled)
- Available payment methods

Group Invoice Email: After submitting the registration, the organizer enters an email address to receive the **group invoice**.

Attendee Confirmation Email: Each attendee also receives their own Training Registration Confirmation email (and Zoom link, if applicable).

 **Tip:** Use the **Registrations Grid** and each attendee's **invoice list** to confirm whether group discounts applied correctly and to verify all payment statuses.

 **Video Tutorial:** Learn how group registration works, including how fees are calculated and how payments are recorded when registering multiple staff.

<https://www.loom.com/share/265990b3333c447db10ccffdfb666535>

Transfer Registrations

The Registration Transfer feature allows Coalition staff to replace one active registrant with another while retaining the original payment record.

Transfer a Registration:

- Click the Transfer icon in the Registrations Grid.
- Enter the new attendee on the confirmation page.
- Click **Transfer** to finalize.
- The original registrant is moved to **Canceled** and receives the cancellation email.
- The new registrant receives all confirmation emails, including the virtual link if applicable.
- If the event has a fee that was already paid, the payment transfers to the new registrant. A note appears on the invoice and in the Payment Log.
- If the event includes custom questions, CEUs, or accommodations, the new registrant must use their confirmation link to complete those fields.

 **Note:** Registrations cannot be transferred after the event has ended or after the registrant has been checked in.

 **Video Tutorial:** Learn how to transfer a registration to a new attendee.

<https://www.loom.com/share/481a4f4fd9ca4522b87bbd919d363825>

E-Learning

The E-Learning Grid displays all **Active, Inactive, and Archived** E-Learning courses in your system. Tabs also display your personal **In Progress** and **Completed** trainings that you are personally registered for.

E-Learnings are asynchronous online courses that can be completed at any time. Some sites also include **Live E-Learnings**, which combine a live event with an online course for hybrid learning.

Add New: Click this button at the top of the page to create a new E-Learning.



E-Learning Grid Column Options

Columns in the grid can be added or removed as needed.

- **Title:** Displays the course title.
 - **Clickable Hyperlinks:** Event titles are clickable hyperlinks in both the on-screen grid and exported Excel reports, allowing quick access back to the course page in Coalition Manager.
- **Category:** Shows the assigned E-Learning category.
- **Event Accesses:** Displays which Contact Types or Access Groups can view or register for the course.
- **Content Areas:** Displays the training topic(s) associated with the course.
- **Tag:** Displays any tags applied to the course for sorting or filtering.
- **★SCORM Training?:** *(For SCORM-enabled sites only)* Indicates if the course includes a single SCORM file; click **Yes** or **No** to filter results.
- **★Training has SCORM Lessons?:** *(For SCORM-enabled sites only)* Indicates if the course includes multiple SCORM files; click **Yes** or **No** to filter results.
- **★Merit Course ID:** Shows the Merit integration identifier, if enabled.
- **🔑Live Event?:** *(For sites with Live Online enabled)* Indicates whether the course includes a live component; click **Yes** or **No** to filter results.
- **🔑Virtual Meeting Type:** *(For sites with Live Online enabled)* Displays whether the course session is a **Webinar** or a **Meeting**.
- **🔑Meeting ID:** *(For sites with Live Online enabled)* Displays the Zoom Meeting ID linked to the course.

E-Learning Grid Icons

	Copy Link	Copy the link to the course promo page to your clipboard. Paste the link anywhere to share public course details.
	View	Opens the course promo page to see the course description, payment details, and registration link. When shared, this page displays public information about the course for anyone with the link.
	Edit	Edit the Basic Information section for the course.
	Archive	Move the course to the Archived tab. Archived courses are removed from training searches, registration closes, and in-progress participants can no longer continue.
	Registrations	Opens the Registrations Grid . View detailed data about all registrants and completed course attendees, including status and progress information. (See the Registrations Grid Actions section for more details.)
	View/ Arrange Registration	Drag and drop registration sections into your preferred order. Training-specific questions and registration custom fields can also be repositioned. 👤 Video Tutorial: Rearrange training registration sections:



		https://www.loom.com/share/0228ca9dc9194e599c7a1b7278abca16
	Additional Questions	<p>Add custom questions to the course registration form. These questions are created using the same process as the Custom Forms module and apply only to this specific event.</p> <p>⚠ Note: Registration questions that apply to all events within an Event Type are created in System Configuration.</p> <p>For setup guidance, see the Custom Forms section of this handbook for step-by-step instructions on creating and managing custom questions.</p>
	Duplicate	Create a copy of the course, including all basic information, lessons, quizzes, and resources.
	Design	Open the Design Dashboard to add, edit, or remove course content and materials.
	Preview	Open a preview of the course to view an approximation of how it appears to participants. Use this to review layout and lesson flow before publishing.
	Deactivate	Moves the course to the Inactive grid and removes it from participant view. In-progress participants cannot continue until the course is active again. New registrations cannot be submitted until the course is activated.
	Summary	Run a report to review built-in quiz and evaluation results from all in-progress and completed participants.
	View Evaluation Summary	View and export collected survey response data if a Custom Form survey link was added in the course's Basic Information.
	Activate	In the Inactive tab, Reactivate a previously inactive course to restore participant access and resume normal registration and progress-tracking.
	Unarchive	Restore a course from the Archived tab. Once unarchived, it moves to the Inactive tab, where it can be reviewed or reactivated.
	Delete	Permanently remove an archived course from the system. This action cannot be undone. Only coalition admins can delete courses.

E-Learning Registrations Grid

Grid Tabs: The E-Learning Registrations Grid displays all registrants for the event and organizes them into tabs: **In Progress**, **Completed**, **Needs Approval** (if enabled), and **Expired**.

E-Learning Registrations Grid Actions

The E-Learning Registrations Grid includes all of the same actions as the Trainings/Events Registrations Grid. See the Current Events > Registrations Section for more details. In addition to these actions it also has Send E-Learning Access Email.

Send E-Learning Access Email: Resend the automated Online Training Access Link Email to selected



participants. This email includes the registrant's unique link to their E-Learning Dashboard, where they can start or continue the course.

⚠ Note: Sync Check In and Generate Report are only visible for **Live Online Courses** connected to **Zoom**.

⚠ Note: For **Live Online (Version A)** events, if a participant attends the live portion but does not complete the required online portion before it expires, the participant is moved to the **Expired** grid.

E-Learning Registrations Grid Icons

	 Join In	For Zoom-enabled Live Online events, open the participant's unique Join page. Right-click to copy and email the link if needed.
	Copy Link	Open the participant's Course Dashboard. This link is emailed to registrants at the time of registration, or it can be copied from here and shared as needed. Participants do not need to log into CM to access or complete the course. Staff can also use this link to view the course exactly as the participant sees it, for troubleshooting.
	Detail	View the participants registration information.
	Edit	Edit the person's registration information.
	 Participant Results	For SCORM-enabled Courses, view SCORM status details, such as required steps, start and stop times, and quiz status. Information shown depends on how the SCORM package was created.
	Archive	Archives the registration and moves the registrant to the Archived tab. No cancellation email is sent.
	View Status	View the participant's course progress, which lessons are complete, and time spent in each lesson.
	 Check in/ Uncheck	<i>(Live Online Courses only)</i> Use Check In to mark participants as having attended the live session. Check-in attendees individually or use Sync Check-In to pull attendance from the virtual platform. Checking-in distinguishes who attended the live event from those who registered but did not attend. ⚠ Note: CM has two versions of the Live Online feature. Depending on which version your site uses, checking-in a participant may or may not mark the course as completed. Contact CM Support if you are unsure



		which version is enabled for your site.
	Cancel Registration	<p>Move the registrant to the Canceled tab and send a cancellation email.</p> <p>If Stripe is used, canceling a paid registration automatically refunds the online payment.</p> <p>For other payment processors, refunds must be issued manually. Archiving a registration does not send a refund.</p>
	Download Certificate	Download an auto-filled Certificate of Completion with this participant's information for the course. This is the same certificate participants can download from their Course Dashboard after completion.
	Individual Invoice/ Group Invoice	<p>Download a PDF invoice for the course.</p> <p>If the registrant was part of a group registration, both an Individual Invoice and a Group Invoice icon appear.</p> <p>Each paid training or E-Learning registration generates a unique invoice number. After payment, the invoice number appears in the Payment Log and can be added as a column in Combined Reports > Payment Log for easier tracking.</p>
	Pay Online	Open the payment page to pay the Course fee via credit card or bank transfer.
Fee Received	Fee Received	<p>Record details of an offline payment once it has been received.</p> <p>⚠ Note: For E-Learning, participants who select an offline payment method will still receive immediate access to the course. However, they will not receive their certificate until the payment is marked as received.</p>
	Extend	<p>Extend access when a registrant has passed their allowed number of days to take the training. This number is set up in the Event Details page.</p> <p>When prompted, enter the number of days to extend. This gives the participant additional time to continue and complete the Course.</p>
	Send Certificate	Email the certificate to a registrant who has a Completed status.
	Quiz Needs Grading	A graduation cap icon (🎓) appears for participants with quizzes that needs grading. Click the 🎓 icon, then click the eye icon to open and grade the quiz.



Event Attendees

The Event Attendees grid displays all Training Profiles in your system. This includes every person who has ever registered for a training in your system, as well as anyone who entered data on a Non-Coalition Training.

Training Profiles: Each registrant is automatically assigned a Training Profile, which is tied to the **email address** used during registration. Because the email address is the unique identifier in CM, all registrations submitted under the same email will link to the same profile.

 **Tip: Keep Training Profiles Accurate**

- Encourage registrants to register with the **same email address** every time.
- People should **not register others** using their own email.
- Best practice is for users to be **logged in** when registering so their Training Profile connects correctly to their Contact Type and Contact Organization.

Event Attendees Grid Tabs: Training Profiles are organized into two tabs: Active and Archived.

- When a Contact is archived in CM, their associated Training Profile is automatically archived as well.

 **Video Tutorial:** Learn how to use the Event Attendees grid to view registrant profiles, edit connections, and manage records. <https://www.loom.com/share/f82eb9e2439c4dd7bf7630e102442fa2>

Event Attendees Grid Column Options

- **Display Contact Type:** Shows the registrant's Contact Type. Logged-in users automatically connect their Training Profile to their Contact Profile. Registrants not in a Contact Type in CM appear as *General Public*.
- **Display Contact Organization Name:** Lists the registrant's organization. This should match the organization in their Contact Details.
- **Display Name:** Full registrant name.
- **Email:** The email address used to register. This is the unique identifier in CM.
- **Occupation / Job Title:** Displays the occupation and job title if collected during registration.
- **Counties / State:** Displays county and state collected during registration.
- **Name First / Middle / Last / Suffix:** Displays name components exactly as entered.
- **Certification ID**

Event Attendees Grid Icons

	Profile	<p>Click the profile image to view or edit the Training Profile. Update occupation, organization, or other details, or connect the profile to an existing CM Contact if needed.</p> <p>The following fields display for each Training Profile:</p> <ul style="list-style-type: none">• Contact Information: Name, email, phone number, and address.• Certification ID• Attendee Profession Information: Occupation and Job Title• Event Reminder Method: Event reminders can be selected to send by email or text, if this feature is enabled on your site.
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		Contact the CM Support Team to customize and/or make these fields required.
	Registrations	<p>View the registrant's full training history across all Training Events and E-Learning courses.</p> <p>Registrations are organized into three tabs:</p> <ul style="list-style-type: none"> ● In Progress: <ul style="list-style-type: none"> ○ Displays all active registrations that are not yet complete. This includes: <ul style="list-style-type: none"> ■ Upcoming Training/Events ■ Past Training/Events where the registrant was not marked as attended or completed ■ E-Learning courses that are in progress and still active ○ From this tab you can Archive, Edit, Cancel, Pay Online, and Download Invoice (if applicable). ● Completed: <ul style="list-style-type: none"> ○ Displays all finished trainings and completed E-Learning courses. ● From this tab you can View or Edit Registration, Pay Online, Download Invoice (if applicable), and Download Certificate. ● Expired: <ul style="list-style-type: none"> ○ Displays E-Learning courses that were not completed within the allowed time. ○ From this tab you can Edit, Extend, and Archive.
	Non Organization Trainings	Open the attendee's Non-Organization Trainings records to add, edit, or archive external training entries.
	Archive	Archive the Training Profile. Archiving removes the profile from Active view and into the Archived tab.
	Unarchive	Restore the Training Profile from Archived to Active.

Event/Attendees - Contact Admin View

When Contact Admins log in, they see an additional section in the Training/Events module called Event Attendees. This section allows Contact Admins to view and manage the training profiles of every staff member associated with them.

From the **Event Attendees** grid, Contact Admins can:

- View all staff who have ever registered for a training through their organization
- Open each person's **Training Profile** to confirm or update profile details
- Review staff training history, including completed, in-progress, and expired registrations



- Download certificates for completed trainings
- Run registration or attendance reports to view training activity within a selected date range
- Filter results by date, staff member, or completion status to quickly locate required records

This view is designed to help Contact Admins track staff compliance, document required trainings, and ensure organizational training records stay accurate and up-to-date.

 **Video Tutorial:** Learn how Contact Admins can log in, view staff training records, download certificates, and run attendance reports.

<https://www.loom.com/share/4a99d4bdc637438e8e7bb726ccf4730a>

Registrations/Attendance

Use the **Registrations/Attendance** search to view detailed data on attendees from:

- Live Events
- E-Learning Courses
- ★ Merit Trainings (*for sites connected to the Merit platform*)
- Non-Organization Trainings

This tool allows you to filter by date, training type, attendee information, and completion status to generate customized attendance or registration reports.

 **Video Tutorial:** Learn how to filter, customize, and export Registrations/Attendance reports.

<https://www.loom.com/share/5b456b2a98d24188a4178e905c7800b0>

Excel Report Links to Downloadable Certificates: If certificates or documents are attached to Non-Coalition Trainings, a clickable hyperlink appears in the grid. When exporting results to Excel, each hyperlink appears in its own cell so you can open or download certificates directly from the spreadsheet.

Filter Options

Select any of the following options to refine your results

- **Date Range:** Select the date range for your report.
- **Time Option**
 - **Any Time:** Includes both registration and completion dates within the range (Default)
 - **Registration Date:** Registrations submitted within the date range
 - **Completion Date:** Trainings completed within the date range
- **Training Type:**
 - **Any Training Types** (Default)
 - **E-Learning** (including ★ Merit or ★ SCORM)
 - **Trainings/Events**
 - **Non Organization Trainings**
- **Include Archived Attendees**
- **Contact Type:** Default includes All Contact Types.
- **Contact:** If you are filtering by Contact Type, you can also select to filter by a specific organization or individual within the Type(s).
- **Attendees:** If you are filtering by Contact Type(s) and Contact(s), select one or more Contact Staff, if you want to narrow the search even further.
- **Attended Event?**



- **Any** (Attended or Did not attend)
- **Attended events** (Default)
- **Did not attend event**
- **Is Registration Fee Paid?**
- **Event Type**
- **Other Type:** Search by text entered when *Other* was selected as the Event Type.
- **Organization Event Title(s):** If multiple events, separate by commas
- **Organization Event Keyword(s):** If multiple events, separate by commas
- **Attendee Organization(s):** Instead of using the Contact dropdowns above, type the organization name
- **Include Canceled?**
 - Any
 - Include Canceled
 - Does not include Cancelled (Default)
- **Attending Entire Conference?**
- **Funding/Grant Source(s)**
- **Payment Method:** Mail, In Person, Online
- **Accommodation**
- **Occupation**
- **Accommodation Detail:** Enter keywords to search details provided by registrants.
- **Attendee Release**
- **Job Title**
- **Registration Email**
- **Phone**
- **Last Four CC:** Search by the last four digits of the credit card used for payment.
- **Certification Id:** Search by the Certification ID listed in a user's profile.
- **State:** Search by the registrant's state.
- **County:** Search by the registrant's county.

Registrations/Attendance - Contact Admin View

Contact Admins can view and track training records for all staff within their organization, as well as any non-organizational contacts who have been formally associated with their organization. This report is designed to help Contact Admins track training compliance, document required trainings, and ensure organizational training records stay accurate and up-to-date.

⚠ Note: To view training data for contacts outside of their organization, Coalition Manager Staff must first establish the associated contact connection.

🎥 Video Tutorial: Learn how to set up the Associated Contacts feature and how Contact Admins can view training records for people outside their organization.

<https://www.loom.com/share/89c7995924f54449b7ebec49c7c550a8>

Using the Registrations / Attendance Grid

Contact Admins can manage and review training data using the tools available within the grid:

- **Filters:** Use the dropdown menus to filter results by date of registration or attendance, staff name, or—if access is enabled—Contact Type or individual Contact from associated organizations.
- **Column Controls:** Add or remove columns to customize the grid layout and organize data based on reporting needs.
- **Document Downloads:** Click linked files to download documentation for **Non-Coalition**



Trainings.

- **Export Options:** Export results to **Excel** or **PDF** to save or share an offline copy of the report.

 **Video Tutorial:** Learn how Contact Admins log in, view staff training records, download certificates, and run attendance reports. <https://www.loom.com/share/4a99d4bdc637438e8e7bb726ccf4730a>

Non Coalition Trainings

The Non-Coalition Trainings section allows you to enter and track continuing education or professional development completed outside the Coalition or Network: any training not automatically tracked in Coalition Manager. When enabled, logged-in users can add their own external training records.

 **Video Tutorial:** Learn how to add, view, and report on Non-Coalition Trainings. <https://www.loom.com/share/6f7c2242368f477ea17eeda5b49ce50d>

Add a Non-Coalition Training:

- Click **Add New**
- **Type:** Select the Training Type from the dropdown list
 - Options are set up in System Configuration > Trainings/Events > Non-Coalition Trainings
- **Title**
- **Event Dates**
- **Hours**
- **Presenter**
- **Description:** Add a description, including hyperlinks if needed.
- **Upload Documents:** Upload supporting documents, such as certificates, agendas, or receipts.

 **Clickable Links:** Uploaded documents appear as clickable links in the Registration/Attendance filtered grid and in exported Excel reports.

 **Note:** The Non Coalition Trainings section can be removed from sites that do not use this feature. Request to add or remove this option by contacting the CM Support Team.

 **Note:** Information entered in Non-Coalition Trainings is for registration tracking only and does **not** populate in Time Tracker. If training attendance must be recorded for grant or billing purposes, use the Project Activity module and assign the appropriate billing source and hours.

Failure to Cancel

The **Failure to Cancel** feature helps enforce attendance policies by automatically blocking registrants who “no-show” or fail to cancel before an event when attendance tracking is required.

Three days after the event, if the registrant has not been marked as cancelled and did not show, the registrant and their organization (if they are staff of a Contact Organization) appear in the Failure to Cancel grid.

While listed, the registrant **and anyone in their organization** are blocked from registering for additional



trainings until the record is resolved.

Events within Failure to Cancel Enabled Event Types: Event Types must have “Failure to Cancel” checked in the Type’s details page in System Configuration > Trainings/Events > Event Type. This means that every event in that event type will have this feature turned on.

 **Video Tutorial:** Learn how to manage the Failure to Cancel list and resolve registration blocks.
<https://www.loom.com/share/10ca5f582f504721bb99975d83959aed>

 **Note:** This is an optional feature that can be enabled upon request. Contact CM Support to turn it on for your site.

Failure to Cancel Grid

The grid lists all registrants and organizations currently blocked due to non-cancellation or no-show status. Each record displays:

- Contact Type
- Organization
- Participant Name
- Event Title
- Event Days

Resolve a Failure to Cancel

To restore registration access:

- Go to the Failure to Cancel grid.
- Locate the affected registrant.
- Click the Resolve icon.

Once resolved, the registrant and their organization regain the ability to register for future events.

My Profile

My Profile displays as a section for any user that has a training profile, including Coalition Staff.

View Your Training Profile

Click **My Profile** to view and manage your own Training Attendee Profile. Keeping this information up to date ensures that your registrations, reminders, and certificates populate correctly.

Your profile includes:

- **Contact Information:** Update your name, email address, phone number, and mailing address.
 - If the logged-in Contact Staff member is an Admin, they can update contact information for any connected attendee profile by selecting another person from the dropdown menu.
 - If Text Messaging is enabled on the site, users can opt in or out of text messages by selecting or deselecting **Is Text Opt In?**
- **Occupation & Job Title:** Select your current occupation or discipline from the dropdown.
- **Certification ID:** Add or update your certification number, if applicable.
- **Event Reminder Method:** Choose whether to receive event reminders by email or text message, if text reminders are enabled on the site.
 - Reminder texts are separate from other text messages and are sent automatically when a reminder message is configured in the event details.



My Registrations

My Registrations displays for any user with a training profile. Any user with a login who has registered for or completed a Training Event or E-Learning course can access this section to view their full training history.

Registrations are organized into three tabs:

- **In Progress:** Displays all active registrations that are not yet complete. This includes:
 - Upcoming Training/Events
 - Past Training/Events where the registrant was not marked as attended or completed
 - E-Learning courses that are in progress and still active
 - Available Actions: Archive, Edit, Cancel, Pay Online, and Download Invoice (if applicable).
 - Only coalition staff can see Archive
- **Completed:** Displays all finished trainings and completed E-Learning courses.
 - From this tab users can cancel a registration, Pay Online, Download Invoice (if applicable), and Download Certificate.
- **Expired:** Displays E-Learning courses that were not completed within the allowed time.
 - From this tab registrants can Edit and Archive.
 - **⚠ Note:** Coalition staff can extend their own expired E-Learning courses or extend courses on behalf of other users; standard users can also see their Expired course on the E-Learning page under In Progress.

E-Learning Report

This is an optional report feature. Contact CM Support to enable it for your site.

Use the **E-Learning Report** to view detailed information on attendees who have completed E-Learning lessons.

After selecting a date range, the results grid displays:

- Attendee First and Last Name
- Training Name
- Lesson Name
- Date Started
- Date Completed

This report provides granular insight into lesson-level progress for each registrant. Contact CM Support to request access to this feature.

Quiz Approval

The Quiz Approval section displays all E-Learning participants with quizzes that require review. Click the eye icon to open a quiz and approve or reject responses. Staff use the Grade Quiz Questions feature to review, score, and approve quiz submissions when approval is enabled.

Graded Questions: Open-ended questions can be graded manually on a 0–100% scale with optional written feedback. This feature is typically used for open-ended or essay-style questions that require manual scoring.



 **Video Tutorial:** Learn how to approve and grade E-Learning quizzes, including setup, grading methods, and feedback options. <https://www.loom.com/share/28ba06fa6da9466996c81496b6481382>

Grade Submitted Quiz

- **Quiz Approval Notification:** Administrators listed in the Email for Grading Quiz field on the Event Details page receive an email alert when a quiz requires approval. The notification includes a link to the participant's quiz where answers can be reviewed and scored.
- **Registrations Grid:** A graduation cap icon (🎓) displays for participants with quizzes requiring grading. Click the 🎓 icon, then click the eye icon to open and grade the quiz.

Quiz Approval Page: The Quiz Approval grid displays tabs for unapproved quizzes. When viewing a quiz, the following info displays at the top of the page:

- **Total Questions**
- **Correct Answers**
- **Total Score**
- **Result**
- **Passing Score**

Quiz Question: Each question displays with the participant's submitted answer.

- **Grade this Response:** Enter a score on a percentage scale (0% = incorrect, 100% = correct).
- **Feedback:** Enter optional feedback for the participant.

Submitted Quiz: Once grading is submitted, the participant's progress and completion status update automatically. Participants receive an email indicating whether their quiz was approved or rejected.

- **If approved:** They receive the *Training Quiz Passed* email and can continue the course.
- **If rejected:** They receive the *Training Quiz Failed* email with a link to retake the quiz.

 **Note:** There is no limit as to how many times a registrant can take a quiz.

Members Training Event

This feature allows Contact Organizations to promote their own trainings or events on your Coalition Manager dashboard. It applies only to Contact Types that are organizations with system access; individual users cannot use this feature.

Approved member events with future dates appear to all users on their main Dashboard and their Training Dashboard under Upcoming Member Training Events.

 **Note:** Only upcoming events are displayed. Pending, denied, or past events are hidden.

 **Note:** This is an optional feature that can be enabled by request. Contact CM Support to turn it on for your site.

 **Video Tutorial:** Learn how members can submit and how admins approve or deny events in the Members Training Events feature: <https://www.loom.com/share/9935434e9bef45009cf3e66451174ad3>

Submit a Member Event

When enabled, users can submit a new event by going to **Training & Events > Members Training Events** and clicking **Add New**.



- **Event Title:** Enter the event name.
- **Event Dates and Times:** Enter the start and end date/time.
- **Event Address:** If an address is entered, a Google Map automatically appears on the promo image.
- **Description:** Enter event details or a summary.
 - **Tip:** Include registration instructions if applicable. Member Events do not use CM registration, so include a hyperlink to the external registration page.
- **Promo Image:** Upload an image for the promo page and Upcoming Events.
 - If no image is uploaded, CM displays the default image from System Configuration > Organization Specific Info > Member Event Default Image.

Member Access to Submitted Events: Staff within the same member organization can view their organization's Pending, Approved, and Denied submissions.

- Only the submitting user and the Contact Admin can **edit** or **archive** their submission.

Members Training Events Grid: The grid includes four tabs:

- **Approved:** Coalition Staff and Admins see additional actions: View, Edit, Deny, Archive.
- **Pending:** Bulk approval checkboxes appear only on this grid.
- **Denied**
- **Archived**

Members Event Approval Process (Coalition Staff)

When a member submits an event, the Members Training Event Notification email is sent to the address listed in: System Configuration > Site Specific Info > Notifications > Members Training Event Notifications.

Staff can click the link in the email to open the event directly. The promo page displays the submitted details.

From the grid, Coalition Staff can view, edit, approve, deny, or archive each submission.

When an event is approved or denied, CM sends an automated email to the submitting user.

⚠ Note: If Coalition Staff add a Member Event themselves, it automatically appears in the Approved tab.

Denied events may be reactivated by staff to return them to the Pending tab.

Approval Page: When reviewing a pending submission, the event's basic details display in read-only format. The status (Pending, Approved, or Denied) appears in the bottom-left corner of the page.

- **Approving:** Click **Approve > Yes** to confirm.
- **Denying:** If denying, enter a **Reason for Denial** before submitting.



Donor Management

The Donor Management Module is used to collect, track, and organize all donations and interactions with prospective and/or active donors. Donors can give online through credit card or ACH bank transfer, and staff can manually enter information on cash or check payments, as well as other offline payments, such as in kind donations. This keeps all donation records in one centralized location.

Staff can manage donor profiles, view giving history, add interaction notes, export donor email addresses for email and marketing communication, and run donation reports as needed. Automated notifications can also be configured to send thank-you emails, birthday messages, and annual giving summaries.

Use the Donor Management Module to:

- Record and manage online or offline donations
- Track donor history and communications
- Add and manage donor interactions
- Configure donation tags and custom donor fields
- Manage email marketing lists
- Generate giving reports and summaries

 **Video Tutorial:** Learn how to collect, track, and report donations.

<https://www.loom.com/share/079e82905a5446518679a702de0a8191>

Donor Access, Dashboard, and Profiles

Donors can log in to your Coalition Manager site to view their giving history, update their profile, and manage recurring donations. After a donor submits their first online donation, they automatically receive an email invitation to create a password and access their account.

Donor Access

After a donor's first online donation, two transactional emails are sent:

- **Donation Thank You Email:** Sent immediately after the donation is processed. Confirms the gift and introduces the donor login feature.
- **Validate Email:** Sent automatically to all new CM users, including donors. Includes a link to verify their email and create a password to access their profile.
 -  **Tip:** You can customize the Validate Email in MailJet to explain that donors may log in to manage their giving. The Validate Email is used for all users, including Contacts and Donors.

 **Note:** Donor login access is built into the system and cannot be disabled.

Donor Dashboard

When donors log in, their main dashboard displays:

- Announcements (if configured for donors)
- Public Trainings
- Public Resources

 **Note:** If a donor also has another user role (such as a Contact or Organization Staff) both roles appear under the same login if the same email address is used.



Donor Module View

When logged in, donors see the Donor Module listed in the left-hand menu. From this section, they can access:

- **Donor Dashboard:** Summarizes giving history, including total donations, current month and year totals, average monthly amount, and all-time total.
 - **Recurring Donations:** If a donor has an active recurring donation, they can view and cancel it directly here.
-
- **My Profile:** Donors can update their personal information, mailing preferences, and visibility settings. Fields can be customized, removed, or made required.
 - First, Middle, and Last Name; Pronoun
 - *Birthday (automatically triggers a birthday email using the “Happy Birthday” transactional template in MailJet)*
 - Allow to Publish? (*permission to be publicly listed as a supporter*)
 - Show Address? (*permission to display donor’s address publicly*)
 - Street, City, State, Zip, Country
 - Phone, Email, Mailing List selection
 - Organization, Job Title
 - Significant Other’s First, Middle, and Last Name
- **Donate Now:** Submit a new one-time or recurring donation online.
- **Reports:** Donors can filter and search their giving history by:
 - Report Duration (Monthly, Quarterly, Semiannual, Annual, or Fixed Period)
 - Donation Search Type: Transaction Date and/or Date Received
 - Donation Amount Min/Max
 - Donation Campaigns
 - Organization
 - Donor Name
 - Significant Other Name
 - Donor Contact Info: Email, Phone, City, State, Zip
 - Donation Type (One-Time or Recurring)
 - Processed Donation (Processed or Error)
 - Recurring Term (Monthly, Quarterly, or Yearly)
 - In Honor/In Memory
 - Donations Allowed to Be Public
 - Donation or Donor Note
 - Transaction Reference Number
 - Last 4 Digits of Credit Card Used
 - Offline Donation Types (If set up)
 - Market and Sales Value minimums and maximums

New Donation

The **New Donation** page is the same page that displays as the public **Donate Now** form. When logged in as Coalition Staff or Admin, the page may also show custom questions that are normally hidden from donors. The page can be accessed by Coalition staff, logged-in donors, or the public through the Donate Now link or from the New Donation section in the Donor Module.

Coalition staff can also enter donations on behalf of donors when payment details (credit card, bank



transfer, cash, or check) are provided. The URL can be shared on your website, in emails, or in printed materials for one-time or recurring donations.

⚠️ Note: Many fields and sections can be customized, removed, or made required in System Configuration. Fields not marked *Visible to Donor* display only for Coalition staff.

👤 Video Tutorial: Learn how to process online donations, customize fields, and use the public Donate Now link. <https://www.loom.com/share/079e82905a5446518679a702de0a819>

Add a New Donation

Donation Information: Enter the basic details of the donation.

- **Payment Amount:** Enter a custom amount or select a suggested amount.
- **Suggested Donation Amounts:** These can be customized to any dollar values.
 - **👤 Video Tutorial:** Overview on Suggested Donation Amounts <https://www.loom.com/share/e1f559ea01bd404ba84f1e0fd1fb07fc>
- **Recurring Donation?:** Select One-Time or Recurring.
 - **Recurring Term:** If recurring is selected, choose from Monthly, Quarterly, or Yearly.
 - **⚠️ Note:** Contact the CM Support Team to set up an additional webhook in Stripe, which is required to add a Quarterly option.
- **Donation Campaigns:** Categorize campaigns or tags (e.g., Giving Tuesday, Annual Fundraiser) created in System Configuration. If no Campaigns are created, this field does not display.
 - **💡 Tip:** Coalition Admins can copy and share direct links with donors to contribute to a specific donation campaign.
- **In Honor or In Memory Of?:** If either option is selected, an additional section displays where the donor can enter the First Name and Last Name of the person being honored or remembered.
- **Would you like to notify someone of the donation?** At the end of the page, donors can choose to notify someone about a tribute donation.
 - **Yes / No Checkbox:** Select Yes to open the notification fields.
 - **Person to be Notified:** Enter the name of a person you want notified.
 - **Email or Mail:** Choose how the notification will be delivered.
 - **Email Address:** Enter email address to send an automatic Donation Notification Email.
 - **Mail:** When selected, fields appear to enter a physical mailing address.
 - **💡 Tip:** Coalition Staff who receive donation notifications should check the honoree information, as they will need to send the physical mailing.
 - **Message:** Enter a personalized message to include in the recipient notification.
 - **👤 Video Tutorial:** Learn how donors can dedicate a gift and send a personalized message. <https://www.loom.com/share/1d39a921c5b14a94add2648523c0466d>

Personal Information: This section creates or updates a Donor Profile. The email address serves as the unique identifier so all donations link to the one donor record. Fields include:

- First, Middle, Last Name; Prefix, Suffix
- Pronouns
- Organization
- Email
- Phone

Payment Information: Once required personal information is entered, the payment fields appear. Payments are processed through your connected processor (i.e. Stripe, PayPal, or [Authorize.net](#)). By default, CM systems that are connected to Stripe can accept online payments via Credit Card and ACH Bank Transfer. Reach out to CM Support to disable ACH Bank Transfer, if you want that method



disabled. Coalition Manager stores only the last four digits of the card or bank account number.

Billing Address: Used for reporting and address label exports.

- Street Address, City, State, Zip, and Country

Notes Related to This Payment: Comments may be added by the donor or staff. These are visible to both the donor and staff.

Custom Donation Questions: Coalition Admins can add additional questions to this page in System Configuration.

-  **Video Tutorial:** Learn how to create and display custom donor questions.
<https://www.loom.com/share/3eae4f501404281a66a2630c9c4a7f3>

 **Donation Transaction Optional Fee:** When enabled, donors who selected to pay by Credit Card can opt in to cover transaction fees (commonly around 3%). Selecting this option increases the total amount automatically by the configured percentage. This feature must be activated by CM Support.

-  **Video Tutorial:** Learn how donors can opt in to cover transaction fees.
<https://www.loom.com/share/b87083c5ccde4f38b2b780e82c6d2ffb>

Donors

The Donors grid displays all donor profiles, including active Donors and Prospective Donors. This section is used to manage donor information, record donations, and track donor interactions.

From the Donors Grid you can:

- Update donor contact or profile information
- Add new donors, including Prospective Donors
- Record offline donations and attribute them to a specific donor
- Track and record donor interactions
- Email donors through your own email platform

Donor Profiles: A **Donor Profile** is automatically created for anyone who makes a donation, whether the gift is made online (credit card, ACH) or offline (cash, check).

Create a New Donor Profile

- Click **Add New** at the top of the page
- **Personal Information:**
 - **Prefix, First/Middle/Last Name, Suffix, Pronoun**
 - **Birthday:** Triggers the automatic “Happy Birthday” transactional email each year using your MailJet template
- **Allow to Publish?:** Select if the donor agrees to have their name publicly listed.
- **Notes about the Donor:** Use this internal-only section to store donor preferences, giving details, or relationship notes. Text can be formatted or hyperlinked.
 -  **Note:** Donors cannot view or edit the *Notes in the Donor* section.
- **Contact Information:** Update contact details used for reporting and address label exports.
 - **Show address?:** Indicates whether the donor’s address can be published.
 - **Add to Mailing List?** Select to include the donor in mass email communications. Selecting this sends the donor’s email address to the Email Marketing System and displays the Mailing List field on the page.
 - **Mailing List:** If Add to Mailing List is selected, choose one or more lists to add the donor to. Donors are automatically added to the matching lists in your



		<p>From this page, you can:</p> <ul style="list-style-type: none"> • Edit or archive a donation using the action icons • Click Detail to view full information about a specific donation • Click Add Offline Donation to enter a new cash or check donation (see next section) • Click the Contacts dropdown at the top of the grid to view the donation record of other donors or contacts associated with the donor. <p>See the Donations section below for more details.</p>
	Offline Donation	Add an Offline Donation to this Donor's record. See Add an Offline Donation in the Donors Grid section below for more details.
	Archive	Archive the Donor Profile. (Visible to Coalition Admins only)
	Unarchive	Unarchive the Donor Profile. (Visible to Coalition Admins only)
	Delete	Delete the Profile. (Visible to Coalition admins only)

End of Year Donation Email

Each January and February, **Coalition Admins** can send a personalized summary email to all donors who contributed in the previous year. This message includes a list of each individual donation, the total amount donated, and a thank-you note.

The email is sent using a pre-built transactional template titled **End-of-Year Donor Verification** in your organization's MailJet account.

Send End of Year Donation Email

- **Generate the End of Year Donor Verification:** From the Donors Grid, click the End-of-Year Donor Verification button at the top of the page.
 - This report displays all donors from the previous year, including their donation summaries.
 - **⚠ Note:** Recurring donors appear based only on their initial recurring donation. If the recurring schedule began before the previous year, the donor will not appear in the report; if it began during the previous year, only the first contribution in that schedule will be included. If a recurring donor does not appear in the report, a separate thank-you email must be sent.
- **Review the Report:** Carefully check donation amounts for accuracy. If you spot any errors, update donor records using the Donor Profile, Donations Grid, or Donation Search.
- **Send the Email:** When you're ready, click the **"Click to send end-of-year donor email"** button. You'll be prompted to confirm. Once confirmed, the system will immediately send the emails to all people on the list.



-  **Video Tutorial:** Learn how to generate and send end-of-year donor summary emails to all contributors. <https://www.loom.com/share/98c36799f9fa4480a69db3210b8dccc>

Donations

The Donations page is home to the main Donations Grid and the Add Offline Donation tool. From this page, Coalition staff can view all successful, failed, and recurring donation records, as well as enter information about donations received outside the online donation form.

Donations Grid: Donations are listed individually and not grouped by donor. From this grid, staff can edit, view, archive (visible to Coalition Admins only), or manage recurring donation records.

- **Tabs:** Use the Processed, Failed, Archived, or Recurring tabs at the top of the grid to filter results.
 - **Processed:** Displays all successful donation transactions, including one-time and recurring gifts. Each record includes donor information, transaction date, donation amount, campaigns, and payment log details.
 - **Failed:** Displays donations that were not successfully processed.
 - **Archived:** Displays donations manually archived.
 -  **Note:** Only Coalition Admins can archive and unarchive donation records.
 - **Recurring:** Displays all active recurring schedules, including cancellation dates (if any), payment methods, and amounts.
 - A Recurring Donation can be edited directly from this tab.
 -  **Note:** Only the first donation in a recurring schedule displays here. All subsequent donations appear in Processed.
-  **Video Tutorial:** Overview of the Donations Grid and how to manage online and offline donations. <https://www.loom.com/share/d4f13ee59c8f48e6bab13646d4753c77>

Donations Grid Actions

	Edit	<p>Edit Individual Donation: Some informational edits can be made, but the amount records are locked for financial accuracy.</p> <p> Note: Processed Donation amounts cannot be edited in Coalition Manager. To adjust a donation amount or issue a refund, log into your connected payment processor (e.g., Stripe or PayPal) to complete the update. Contact the CM Support to update the amount shown in your System.</p>
	Archive	Archive the Donation. (Visible to Coalition Admins only)
	Detail	Click to view the donation's information.



	Manage	This option appears only for Recurring Donations. Use it to update the credit card, donation amount, or recurring term for the donation. ⚠ Note: Updating the donation amount or credit card automatically triggers a new donation payment.
	Unarchive	Unarchive the Donor Profile. (Visible to Coalition Admins only)
	Delete	Delete the Profile. (Visible to Coalition Admins only)

Offline Donations

Add an Offline Donation

Offline donations include gifts received outside the online donation form, such as mailed checks, cash contributions, or in-kind donations.

- Click **Add Offline Donation**
- **Day Donation Received**
- **Offline Donation Type:** Select the donation type, if applicable. Offline Donation Types are configured in *System Configuration > Donor > Offline Donation Types*
 - **In kind Item:** If an Offline Donation Type is selected additional fields display.
 - **Market Value:** Enter the estimated value of donated goods or services.
 - **Actual Amount Collected:** Enter the monetary amount received, if applicable.
- **Check (or any reference number):** Enter the check number; this field does not display when an Offline Donation Type is selected.
- **Amount:** Enter the donation amount, if cash or check.
- **Donation Campaign:** Select one or more campaigns/tags to categorize or allocate the donation.
- **Donor Information:** Enter the donor's first, middle, and last name, prefix/suffix, organization, and mailing address.
 - **Email:** Links the donation to an existing donor profile when a matching email is found. This may also trigger a thank-you email, depending on your selections and system configurations (see details below).
- **Notes Related to Payment:** Add any internal notes related to the donation.
- **Custom Donations Questions:** Any custom donation fields created in System Configuration will be displayed here.

Offline Donation Thank you Emails

Default Thank You Email: When an Offline Donation is entered, if an email address is associated with the donation, the default thank you email is sent.

Custom Offline Donation Types: Offline Donation Types can have custom emails tied to the selected type:

- **Custom Emails to Admins:** Sends to the Coalition Staff email listed in Site Specific Info > Donor Management when a donation is tracked.
 - **⚠ Note:** If no Admin Email is created for the Offline Donation Type, no staff notification email is sent—this matches normal offline donation behavior.



- **Custom Email to Donor?:** Sends to the donor's email, if one is associated with the donation.
 - **⚠ Note:** If an Offline Donation Type is selected and no custom Thank You Email is created for that type, no donor email is sent—even if the donation record includes an email address. The system does not fall back to the default Thank You Email.

👤 Video Tutorial: Learn how to create an In Kind Donation type and set up automated donor and staff email notifications. <https://www.loom.com/share/c4b5b933878544a1b225ae65b7e93f2f>

Donation Search

Use the Donation Search to filter and report on donations or donors based on specific criteria. You can run searches by date, amount, campaign, donor information, and other transaction details. Results can be exported for sending text messages (if enabled), sending emails from your email application, or adding contacts to an email marketing list in your integrated EMS.

👤 Video Tutorial: Learn how to use the Donation Search to filter, sort, and report on donations by a variety of criteria. <https://www.loom.com/share/7d7717b91bd34a0286ccfa51fc380e2b>

Build your search criteria by selecting any of the following search options:

- **Report Duration:** Select the time period for your report: Monthly, Quarterly, Semi-Annual, Annual, or Custom Time Period.
 - If you select **Time Period** and leave the date range blank, all donation records will be displayed.
- **Donation Amount:** Enter a minimum and/or maximum
- **Donation Tags/Campaigns**
- **Organization:** Search for donations associated with a specific organization.
- **Donor Name**
- **Significant Other Name**
- **Email**
- **Phone**
- **City, State or Zip**
- **Donation Type:** Select one-time or recurring
- **Processed Donation:** Select **Processed** to view successful transactions or **Error** to view failed payment attempts.
- **Recurring Term:** If you are searching by reoccurring, select monthly, quarterly, or yearly
- **In Honor/In Memory**
- **Donations Allowed to be Public?** Select public donations or private donations
- **Donor Note:** Use keywords to search the donor notes
- **Donation Note:** Use keywords to search donation notes
- **Transaction Ref#:** This information is generated by the payment processing application and can be found in the donation details page.
- **CC Last 4#:** Enter the last 4 digits of a credit card number.
- **Offline Donation Type**
- **Market and Sales Values (Min and Max)**



Email Group of Donors

From your filtered search results you can email donors directly using your computer's default email program or export addresses to your connected Email Marketing System (EMS).

 Video Tutorial: Learn how to email donor groups or export donor emails to your connected EMS.
<https://www.loom.com/share/92249c829a644d578089cecd8f723e16>

Send Email to Donors Through Default Email Program

- Click **Email Group** to open a draft in your default email program (Outlook, Gmail, or Apple Mail).
- All donor emails appear in the **BCC** field.
- If your email system limits BCC recipients, an option appears to copy and paste the addresses manually.

Send Through Connected EMS

- Click **Export Primary Email to EMS** to send the results to your connected email platform (MailJet, Constant Contact, or SendGrid).
- Choose to create a new mailing list or add to an existing one.
- This list is separate from your existing mailing lists.
- Use this option for **one-time or occasional emails**.

All Donors Mailing List

An all donors mailing list, **CM Donors**, is automatically created in your connected email marketing system (i.e. MailJet, Constant Contact, etc.).

All donors entered in Coalition Manager are automatically added to this list, including those added through online donations, offline donations, or manual entry by staff.

Remove Donor from Mailing Lists: When a donor should no longer receive communications, deselect specific mailing lists in their Donor Profile or deselect the **Add to Mailing List** button. Deselecting this button automatically removes the donor from the synced **CM Donors** list as well as all other mailing lists.

 **Note:** Do not rename or delete this list in your email marketing system, as it will break the connection with Coalition Manager.

Donor Interaction

Donor Interactions are touchpoints your organization has with donors or prospective donors. They help staff track communication, outreach, and follow-up tasks in one place. Use this grid to review communication history and manage follow-up tasks.

The Donor Interactions grid displays all interactions tracked in your system. Use the grid to view communication history and manage follow-up tasks.



Tabs include **Completed**, **Pending**, and **Archived**.

Add a Donor Interaction

- Click **Add New** to create a new interaction.
- **Donor Interaction Information:**
 - **Staff:** Your name appears by default; select another staff member if needed.
 - **Interaction Method:** Select the method of interaction. Methods are customized in **System Configuration > Donor Management > Donor Interaction Method**.
- **Notes from Interaction:** Enter interaction details; hyperlinks and uploaded documents may be included.
- **Completion Status:** Select the completion status. Default is Complete.
 - **Complete:** Marks the interaction as finished (defaults to today's date; editable)
 - **Pending:** Assigns follow-up to another staff member
 - Enter a staff name in the **Awaited Action** field.
 - The system emails that staff member automatically.
-  **Video Tutorial:** Learn how to record and manage donor interactions.
<https://www.loom.com/share/f92c2def2cae46deal89da2e0abe7b56>

Donation Import

Use the **Donation Import** feature to upload multiple offline donations at once. This tool is useful when importing donations collected through another donor system or external platforms such as Facebook.

Donations imported with an existing email address are automatically linked to the matching donor profile. New donor profiles are created for email addresses not already in Coalition Manager.

Import Donations

- Click **Download Template** to download the Excel file.
- Enter donation information in the appropriate columns.
 -  **Note: Do not** change or delete any column headers.
 - **Required fields:** First Name and Last Name.
- Save the completed file as a **.xlsx** document.
- Click **Select Files** and locate your saved document.
- Click **Open** to upload, then **Import** to complete the process.
- A confirmation message appears when the import is complete.

 **Note:** Imported donations do **not** trigger thank-you emails to donors.

The **Import Donor Data** feature allows you to add multiple donor records or donation entries at once by uploading a completed import template. This is especially useful when entering large volumes of donor or donation data efficiently.

- **Donations Including an Email with an Existing Donor Profile:** Automatically connects to the donor's existing record, and the related profile data will appear in the Donations Grid.
- **Donations with New Emails:** Creates a new donor profile.
- **Donations with No Emails:** Creates a new profile using a system-generated email address based on the donor's first and last name followed by **@noreply**.
- **No Donation Amount Associated:** Creates a new donor profile categorized as a Prospective Donor.



 **Video Tutorial:** Learn how to import donor data using the donation import template and how new donor profiles are automatically created.

<https://www.loom.com/share/2a311334259848e1b9dfa7905b16beec>



Custom Forms Module

Use this Module to create and manage custom data collection forms for your organization. Set up a new form, define its basic settings, and configure how submissions are reviewed or approved. After saving, you can design the form layout, add questions, and customize response options.

You can control access permissions, schedule open and close dates, and enable automated notifications such as follow-up or confirmation emails. Forms can also include built-in approval workflows for submissions that require review or authorization.

Dashboard

The **Custom Forms Dashboard** provides quick access to all existing form categories that have published forms in them and submission activity. Click on any of the Form Categories to go to a page with all published forms, organized in a list view by category.

Dashboard Tools include:

- **Quick Search:** Search for a form by title.
- **Form Categories:** Click any category box to view the forms within that category. Each category displays the total number of forms it contains.
- **In Progress Responses:** View recent in progress form submissions.
- **Recently Submitted Responses:** Displays the most recent completed form submissions.

 **Video Tutorial:** Learn how to navigate and use the Form Manager Dashboard:
<https://www.loom.com/share/edc453bba8cf4718b4587501ff3d4331>

New Form

To create a new form, click **New Form** and complete the basic settings. You'll add questions and design the form layout after saving this page. The form details must be created first before the design phase begins.

 **Note:** The steps below are mostly presented in order, with callouts highlighting key processes such as editing submissions, managing approvals, and using advanced configuration options.

 **Video Tutorial:** Learn how to create a new Custom Form, set access levels, configure frequencies, enable approvals, and schedule reminders for submissions.
<https://www.loom.com/share/d75d88cf5b5a42838c68218e8f7fd546>

Create a New Form

- Click **Add New**

Basic Form Details:

- **Form Title:** Enter a title for the form.
- **Description:** Add instructions or context for users. Use the formatting tools to include links, images, videos, or GIFs as needed.
 - This text appears at the top of each page of the form.



- **Category:** Select a Form Category from the dropdown. Categories are created in System Configuration by Coalition Admins.
- **Frequency:** Select how often a Contact can submit the form.
 - Frequencies marked with an asterisk (*) apply only to logged-in users.
 - Ensure the form's Access Level requires login if using a restricted frequency type.

■ Unlimited	■ Quarterly*
■ Daily*	■ One Time*
■ Monthly*	■ Annually*
- **Publish Options**
 - **Publish Later:** Default setting. Use until the form is ready. Submissions cannot be made while unpublished.
 - **Publish Now:** Makes the form visible immediately (based on Access Level).
 - **Publish at Specific Date:** Schedule a future date and time for the form to open.
- **Has Form End Date:** Check this box to set a close date. After this date, no new submissions will be accepted and respondents will see a "Form Closed" message.
- **Is Summary Visible to Contact?:** Check this box to let logged-in Contacts view summarized results with filters (such as *own results*, *regional*, or *statewide*). Individual data from other Contacts is never displayed.
- **Submission Notification Email(s):** Enter staff email(s) to receive an email alert, a **Form Response Notification**, when a form is submitted. Separate multiple addresses with commas.

Add Editing Permissions

By default, forms are not editable by the respondents. Respondents must request and be granted permission to edit their response. However, editing permissions can be added, which let you control whether respondents can edit submissions automatically or only with staff approval.

- **Allow Submissions to be Edited without Permission:** Check this box to allow respondents to edit their submission without requesting Coalition Staff approval. When enabled, submissions can be edited multiple times based on the limits you set.
 - Optional settings include:
 - **Edit End Date:** Sets the last date edits are allowed without approval. This is used for forms with Annual frequencies. After this date, edits require Coalition Staff approval in the current year.
 - **Update Notification Email(s):** Sends a Form Response Notification email when a submission is updated. Recommended for all forms that allow edits without permission.
 - **Number of Editable Submissions without Request (this year):** Limits how many times a respondent can edit an Annual form per year without approval.
- **Permission Required Edits:** If edits require permission, respondents see a Request Edit Access button on their submission page. Respondents enter a reason for the request (for example: need to update responses). Login is not required to request edits; the button appears when opening the submission link while logged out.
 - **Edit Request Notification Email(s):** Listed staff receive an email with links to Approve, Deny, Archive, or View the request.
 - If the requester was logged in, their name appears in the email notification.
 - Coalition Staff can manage all requests under **Custom Forms > Edit Requests**.

 **Video Tutorial:** See how edit requests work for non-editable forms, including staff notifications and approving or denying requests.

<https://www.loom.com/share/cfef6ae23e834de79a18de3b9a80d305>



Password Protect the Form

Passwords can be added to restrict access to form responses and design settings. Only Coalition Staff with the correct password can view form data or edit the form's design. Even **Element74/Coalition Manager Staff** cannot access responses from a password-protected form.

Once a form is password protected, it can still be shared according to its access level. However, no one can view form data or edit settings without entering the password.

⚠ Note: If a password is set, Coalition Staff who receive an email link to view a submitted response must enter the password before accessing the submission.

- **Does this form have a password?** Check this box to enable password protection for the form.
 - **Create Password:** Enter the desired password.
 - (Optional) Click the eyeball icon to view the password as you type. 
 - **Confirm Password:** Re-enter the password exactly to confirm.

🎥 Video Tutorial: Learn how to create, protect, and manage password-protected custom forms. <https://www.loom.com/share/2afd73b85f5c4d7ba8b288c0a24bd532>

Add or Remove Passwords to Existing Forms

If a form has already been created, a password can only be added from the **Current Forms** grid.

Add a Password to an Existing Form

- Go to **Current Forms**.
- Click the  **Lock** icon next to the form.
- **Create Password:** Enter the desired password.
- (Optional) Click the eyeball icon to view the password as you type.
- **Confirm Password:** Re-enter the password exactly to confirm.

Remove a Password:

- In **Current Forms**, click the **Remove Password** icon.
- Enter the existing password to confirm.

Add a Form Approval Process

- **Has Approval?** Check this box to enable the approval workflow. From here, choose how approvers will be selected.

Option 1: Pre-Assigned Approvers: Coalition Admins or Staff designate one or more specific staff approvers ahead of time.

- **Need approver staff dropdown in submission:** Leave this box unchecked and then select one or more preassigned staff to approve all form submissions. .
 - **1st Approval Staff:** Select from the dropdown the 1st staff member to review and approve the form.
 - Click **Add New Approval:** Adds another approval step. Each time this is clicked, a new dropdown list of your organization's staff appears.
 - Continue this process to add as many approval levels as needed.



Option 2: Submitter-Selected Approvers: The submitter designates who will approve their form at the time of submission. This setup allows flexibility - different submitters can route the same form to different approvers as needed.

- **Need approver staff dropdown in submission:** Check this box to add a dropdown on the form itself, where each submitter will select who will approve their form.
- **Approvals Staffs:** Select from the dropdown which staff members will appear as available approvers when someone submits the form.
- **Approver Count:** Specify how many approvers the submitter must select (e.g., 1, 2, 3).
 - At submission, the form filler will choose approvers in the order they should review the form.

Form Approval Process

The Custom Forms module supports a built-in approval process, allowing organizations to **review, verify, and authorize submitted forms** before finalizing. Approval history is automatically stored within the submission record.

Approvals are sequential: Each approver reviews the form one at a time, in the order they were assigned or selected.

Once the form is submitted, the approval process begins automatically:

- The first approver receives an email notification, **Form Submission Approval Notification to Staff**, that a submission is waiting for review.
- If approved, the form moves to the next approver (if more than one is required).
- If any approver rejects the form:
 - The submitter receives an email, **Form Rejection Notification Email**, with the rejection message.
 - The form becomes editable again so the submitter can make changes and resubmit.
 - The approval process restarts after the rejected form is submitted again.
- When all required approvers have given their approval, the submitter receives a confirmation email, **Form Submission Approval Notification**, indicating that the form has been fully approved.

Add an Access Level to a Custom Form

Select who can view and complete the form:

- **Open To All:** Anyone can view and submit the form.
 - **⚠ Note:** This option is only available for forms with an Unlimited frequency.
- **All Contact Types with Login:** All logged-in users can access and submit the form.
- **Specific Contact Types with Login:** Limit access to selected Contact Types. You can also restrict access further to specific organizations or staff if needed.
- **Only Staff:** Available to all Coalition Staff.
- **Specific Staff:** Restrict access to selected Organization Teams.
- **Specific Access Group/Committee:** Limit access to members of designated Access Groups or Committees.
- **Link Only:** Access is limited to anyone with the direct link. A login is not required.

Email Options to Custom Form Respondents

The following emails can be customized with a subject line and message to provide confirmations,



reminders, or additional resources. Each option expands to a new section where you'll enter:

1. **Reply-to Address:** The email address that will appear as the sender.
 2. **Subject:** The email subject line.
 3. **Body:** The message text. You can include links, images, or use formatting tools.
-

Has Thank You Email to Contacts Logged In?

Check this box to automatically send a custom thank you/confirmation email to logged-in users who submit the form. When checked, a new section appears for you to create the thank-you email.

 **Video Tutorial:** Learn how to create and send an automatic thank-you email to logged-in users when they complete a custom form.

<https://www.loom.com/share/4e2f755b88de436d8a51c725dd410a59>

 **Tip:** Use to confirm submission, provide next steps, or link to related resources.

 **Note:** For Link Only or Open to All forms, an email notification sends only if the user is logged in when the form is submitted.

Has Pre-Reminder Email?

Creates an email that can be manually sent from the **Form Dashboard** (envelope icon) to members of the selected **Access Group/Committee** before the form opens.

- Use this to notify users that the form will open soon.
- It is recommended to include the **form link** in your message so recipients can easily access it when available.

 **Video Tutorial:** Learn how to create and send a pre-reminder email to Access Group members before a form opens. <https://www.loom.com/share/24fb01135dd4483e91205fe73a6fcd11>

Has Reminder Prior to Close Date?

Creates an email that can be manually or automatically sent to members of the selected **Access Group/Committee** before the form closes.

-  **Note:** The **Form End Date** must be set for this option to appear.
- **Has Reminder Prior to Close Date:** Check this box to enable the reminder email.
 - **Days Before Close Date:** When enabled, this field appears. This is optional and can be left blank if you want to send it manually only.
 - Enter numbers separated by commas (e.g., **1,3** sends reminders 1 and 3 days before the close date).

Send Reminder Emails from Form Dashboard

You can send a reminder manually from the **Form Dashboard** by clicking the **Post Reminder Email** envelope icon.

 **Tip:** Include the form link in the email so recipients can easily complete their submission.

 **Video Tutorial:** Learn how to create automated or manual reminder emails to notify Access Group members before a form closes.

<https://www.loom.com/share/40f49fdf27e344da972ae2a55ef5ba7e>



Custom Form with Unique Submissions

Use this feature when you don't want respondents to log in but still need to ensure that individuals within a specific group can each submit the form only once.

For example, this is ideal for surveys sent to multidisciplinary team members or external partners listed under a Contact Type, but who do not log in to your site.

⚠ Note: This feature only works for forms set to **Access Level – Open to All**.

When enabled, respondents must first select their State and then their Contact Organization from a dropdown list before accessing the form. This list is generated from your Contact list in Coalition Manager database to help prevent duplicate submissions.

Enable Unique Submissions

- **Access:** On the Form Information page, set the Access to Open to All.
- **Enable Unique Submissions:** Check this box.
- **Select Contact Source:** Select **Contact Type** or **Access Groups**
 - **Contact Type:** This will display the entire list of Contacts in the Contact Type for respondents to choose from.
 - **Access Group:** This will display only certain Contacts along with the name of the person who is in the Access group.

⚠ Note: If the organization is not listed, respondents can select Other to add their name and organization manually. Selecting Other automatically adds that new Contact to the selected Contact Type or Access Group in Contact Manager.

Submit a Form with Unique Submissions

This overview describes the experience of a respondent completing a form with Unique Submissions enabled.

Accessing the Form

- The respondent opens the form link (with or without logging into Coalition Manager).
- Before answering any questions, they must select their **State** and then choose their **organization** from a dropdown list.
- This dropdown is populated based on the **Contact Type** or **Access Group** defined during form setup.

Organization Selection

- The respondent selects their organization from the dropdown.
- If their organization is not listed, they can choose **Other** and manually enter their organization details.
 - When "Other" is used, that new Contact/Contact Organization is automatically added to the corresponding **Contact Type** or **Access Group** in **Contact Manager**.

Completing or Saving the Form

- After selecting their organization, the submitter proceeds to the rest of the form questions.
- They can either **submit** the form or **save and exit** to finish later.

Save and Resume Later



- When a respondent selects **Save and Exit**, they are prompted to create a password to protect their in-progress submission.
- This password allows the respondent to reopen and continue the same form later.
- To resume their submission, the respondent can:
 - Use the in-progress link from the confirmation page.
 - Use the link in the **In-Progress Form Submission** email.
 - Return to the original form link, select their Contact information again, and enter the password when prompted (the system displays a message that a submission is already in progress).
- If the respondent forgets their password, they can select the option to **resend the password via email**.

Preventing Duplicate Submissions

- If another person from the same organization tries to start a new submission, they'll receive an error message: *"We found a saved form. Please enter the password."*
- The new respondent must enter the password to access and continue the existing submission.
- If they don't know the password, they can click **Forgot Password** to trigger an email reminder to the original submitter.

 **Video Tutorial:** Learn how to utilize Unique Submissions: <https://www.loom.com/share/3770382628934d13a1e961efda05e675>

Design Dashboard

After saving a form's Basic Information, you'll be taken to the Design Dashboard, where you build and organize your form.

 **Video Tutorial:** Learn how to navigate the Design Dashboard, add sections, and prepare to build your custom form <https://www.loom.com/share/1f45d6e0beb24186a1cd78fffb3d3b68>

Design Dashboard Icons

	Preview	Opens the Form Preview to test layout, flow, and question logic. You can enter data to test functionality, but submissions cannot be saved from Preview mode.
	 Add Conditions	Click this icon to add conditional logic. This allows certain questions to appear, hide, or require certain logic based on previous responses.
	Edit Info	Opens the Basic Information page to update general settings such as the form title, category, frequency, access level, or email options.
	Duplicate	Creates a full copy of the selected form, including all settings, sections, and questions. The duplicated form is saved in the Not Published tab until edited and published.
	Copy Link	Copies the form's public submission link to your clipboard for sharing via email, your website, or brochures.



		This link is also used when connecting evaluations or surveys to training events in the Training Module .
--	--	--

Add a Custom Form Section

A form section must first be created to add questions. Sections organize your form and group related questions together. Each section type has a specific purpose and layout option.

- Click **Add a Section**
- **Select the type of section you want to create.**
 - **Default:** A standard section used to group related questions together. You can add as many Default Sections as needed within a form
 - **Section Title:** Enter a title (e.g., *Participant Information* for demographic questions).
 - **Initial Display Mode:**
 - **Expand:** Section opens automatically when the form loads.
 - **Collapse:** Section remains closed until respondents click the “+” symbol to expand it.
 - **Display in Combined Report?:** Check this box to include this section’s data in the Combined Report (checked by default). Uncheck if not needed.
 - **Visible to Members?:** Check if you want this section’s summary data visible to contacts in their summary report. Leave unchecked if you do **not** want respondents or member users to view aggregate data.
 - **Description:** Add instructions or context for respondents (optional).
 - **👤 Video Tutorial:** See how to create a default section and organize questions for easier data collection.
<https://www.loom.com/share/c612a74e291648b9a673dd81dd972e57>
 - **Page Break:** Splits a form into multiple pages.
 - Respondents can move forward or backward using navigation arrows.
 - Data is automatically saved when moving between pages.
 - Use for long forms to make navigation easier and prevent data loss if the session ends unexpectedly.
 - **👤 Video Tutorial:** Learn how to use page breaks and info blocks to improve form flow and save progress as users move through pages.
<https://www.loom.com/share/d2b5bc15a856495e97041abfb4e4d578>

💡 Tip: Reordering Sections: Collapse all sections for easier navigation, then drag and drop them into the desired order on the Design Dashboard.

Add Form Questions

Question Types: Select the type of question based on how you want to collect data. Each question type displays different design options.

- **Descriptive:** Respondents enter a free-text response. Use this for open-ended questions or comments.
- **Multiple Text:** Respondents enter shorter free-text responses across multiple boxes.
 - **Text Box Quantity:** Enter the number of text boxes to display. Must have a number here.
- **Multiple Choice:** You can create single- or multi-select questions in several formats within the Multiple Choice question type.
 - **Format Options:**
 - **Radio Button:** Displays circles; respondents can select only one option.



- **Checkbox:** Displays boxes. By default, respondents can select multiple options.
 - **Dropdown:** Displays options in a dropdown list. By default, respondents can select one option.
 - **Settings:**
 - **Allow Multiple Selection?:** Check this box to enable multi-select responses (available for Checkbox or Dropdown formats).
 - **Limit Selections:** Enter a number to restrict how many options respondents can select. Enter 0 for unlimited selections.
 - **Add Options:** Click Add Option to create each choice. Continue adding until all response options are listed.
- **Grid:** Creates a data grid that can calculate sums, subtractions, or multiplications across rows and columns.
 - Use for data entry that requires totals or comparisons (for example, expense tracking or numeric scoring).
 - *(See below for more information on how to design a grid.)*
- **File Upload:** Allows respondents to upload documents or attachments.
 - Enter a **maximum number of files**, and it should be kept reasonably low because large limits (for example: 100 or 1000) can cause errors.
 - Uploaded files are stored with the form submission and can be viewed or downloaded by staff with access.
- **Staff Choice:** Displays a dropdown list of your site's staff members (from Contact Manager). Respondents can select a staff member's name from the list.
- **Grant Source:** Displays a dropdown list of funding sources (from System Configuration). Respondents can select the appropriate funding source related to their submission.
- **Likert Scale:** Creates a rating scale that applies the same response options across a group of related questions.
 - Use for satisfaction surveys, evaluations, or feedback forms (for example, *Strongly Agree to Strongly Disagree*).
- **Signature:** Allows respondents to sign the form electronically.
 - Signatures are stored as part of the form submission and can be viewed or downloaded by staff.

Question Details:

- **Question:** Enter the text of your question (e.g., *"Please share a success story"* or *"What was your favorite part of the training?"*).
- **Instructions:** Add extra guidance for respondents. You can include text, images, links, or charts.
 - Instructions are initially hidden and display on a pop-up when the small "i" icon next to the question is clicked.

Question Settings:

- **Is Required?** Check this box to make the question required for form submission.
- **Display on Summary:** Deselect if you do not want this question's data included in Response/Filter report summaries.
 - Checked by default
- **Include in Grid Column Menu:** Select to add this question to the expandable three-dot menu in the Form Submissions grid. 
 - Checked by default
- **Display on Grid:** Select to have this question's data automatically shown in the Form Submissions grid.
- **Searchable Filter Item:** Select to allow sorting or filtering by this question in a Response/Filter search.
- **Control Width:** Choose how wide the question appears on the page (one fourth, half, three



fourths, or the full page). This setting allows you to place questions side-by-side.

- **Has Unique Response?** When enabled, this feature limits each answer so it can only be submitted once. Use this to prevent duplicate submissions on public forms.
 - For example, if a question asks for an **Organization Name** or **Email Address**, once a form is submitted with that response, no one else can submit the same answer. This ensures each organization or respondent can only submit one entry.
 - Unique Response questions are available only for **Descriptive** question types.
 - The form's **Access Level** must be set to **Open to the Public**.
 - The form's **Submission Frequency** must be set to **One-Time Only**.
 -  **Video Tutorial:** Learn how to create public forms that use unique responses to prevent duplicate submissions.
<https://www.loom.com/share/bc5c00eb8c03468bbe7122941ea3de64>
- **Max Character Length:** Set the maximum number of characters (including spaces) that can be entered in the response.
- **Multiple Line Response?** Check this box on descriptive questions to expand the response field for longer answers.

Question Type Examples

 **Video Tutorial:** Learn about the different question types available in Custom Forms and how to configure each one for data collection.

<https://www.loom.com/share/64e25fcf92e142a0aba6f11510085bae>

Question Type	Best Used For	Examples
Descriptive	Open-ended questions where respondents type full sentences or explanations. Use for comments, names of people or organizations, narratives, or detailed descriptions.	<p>“Describe the challenges you experienced.”</p> <p>“Provide any additional comments.”</p> <p>“Explain why you are requesting reimbursement.”</p>
Multiple Text	Short text answers across several fields. Use when you need multiple small entries (names, dates, items), but not long descriptions.	<p>“Enter the names of up to 5 volunteers.”</p> <p>“List the three main goals of your project.”</p>
Multiple Choice - Radio Button	Single-select questions where respondents must pick only one answer. Use for clear, exclusive choices (Yes/No, Role Type, One category).	<p>“Select your primary role.”</p> <p>“Did you attend the full training?” (Yes/No)</p>
Multiple Choice - Checkbox	Multi-select questions where respondents can pick multiple answers. Use for anything that may have more than one true selection.	<p>“Which services does your program provide?”</p> <p>“Select the populations you serve.”</p>
Multiple Choice - Dropdown	Long answer lists or single-select questions where you want to save screen space. Enable Allow Multiple Selection? only when needed.	<p>“Select how satisfied you were with the training.”</p> <p>“Select your occupation.”</p>



Multiple Choice - Dropdown with Limit	Multi-select questions where you must restrict the number of allowed choices (for example: "Select your top 2 priorities").	"Select your top 2 training needs." "Select up to 3 skills you want to improve."
Grid	Numeric or table-style data entry that needs totals or comparisons. Use for expenses, mileage, scoring, or any value that must calculate across rows/columns.	Daily mileage tracking with automatic total. Clients Served (Gender, Age, etc.)
File Upload	Collecting documents or attachments. Use for policies, agreements, receipts, proof of completion, or supporting documentation.	"Attach proof of payment." "Upload your quarterly report."
Staff Choice	Selecting a staff member from your site's staff list. Use for assigning reviewers, case managers, approvers, or staff contacts.	"Choose the staff person who is submitting this request." "Select the approving supervisor."
Grant Source	Selecting a funding source from System Configuration. Use when submissions must be tied to a particular grant.	"Select the funding source supporting this activity." "Choose the grant that covers this expense."
Likert Scale	A group of related questions that share identical response options (for example: Strongly Agree → Strongly Disagree). Use for evaluations, satisfaction surveys, or attitude measures.	"The trainer presented information clearly." "The content was relevant to my work."
Signature	Collecting an electronic signature. Use when confirmation, acknowledgment, or compliance is required at the end of a form.	"Sign to acknowledge the policy." "Sign to submit your reimbursement request."

Opened Ended Question Input Types

For open-ended (Descriptive) questions, you can control the type of data respondents can enter in the response field.

Input Type	Field Accepts	Example
Any characters	Letters, numbers, special Letters, numbers, spaces, special characters	Hello@2025!\$%^
Alphabets and	Letters and numbers only (no spaces or symbols)	Test123



numbers only		
Numbers only	Digits and decimals only (no letters, symbols, or spaces)	45.67
Alphabets only	Letters only (no numbers, symbols, or spaces)	TrainingReport
Yes or No	Checkbox or toggle for binary response	Yes or No
Date	Provides a calendar field for the respondent to select a specific date. Valid date in MM/DD/YYYY format	03/15/2025
Hours Format (15-min increments)	Only accepts numbers in the hours/minutes format. Numbers rounded to nearest 0.25	1.25 (1 hr 15 min)
Positive and Negative Numbers	Integers or decimals including negative values	-12.5 or 200.75
Email	Valid email address format. Entry must have the @ symbol. Email addresses entered into a form will be hyperlinked to open a draft email to that address.	jane.doe@exampl e.com
Zip Code	5-digit or ZIP+4 numeric code	53581
Whole Numbers Only	Positive integers only (no decimals or negatives)	3, 5

Question Grid Icons

	Edit	Open the question's edit page to update its settings. ⚠ Note: Once a question is created, its question type cannot be changed.
	Duplicate	Create a copy of the question with all existing settings.
	Archive	Archive the question. Archived questions no longer appear on the Submissions Grid, are not available as filter options in Response/Filter, and are hidden from the form submission view. Archiving does not remove past answers. If the question is unarchived, all previously submitted data becomes visible again.
	Move	Move the question to a different section. When clicked, a selection box appears where you choose the section you want to move the question to.

Create Grid Questions

Use Grid-type questions to collect and calculate structured numeric or categorical data in a table format. Grids can add, subtract, or multiply values across rows and columns, making them ideal for forms that track counts, service data, or other measurable information.



 **Tip:** Group related data in a single grid to make responses easier to enter and analyze (e.g., tracking hotline calls, shelter nights, or dates of service).

 **Video Tutorial:** Learn how to create and customize Grid-type questions for data collection.
<https://www.loom.com/share/224438548aaf45b29f85f46b3a628583>

Rows:

- **Row Title:** Optionally add a title to group rows (e.g., *Demographic Information*).
- **Has Row Total?** Check this box to sum numeric entries across the row.

Columns:

- **Column Title:** Optionally add a title for each column.
- **Has Column Total?** Check this box to sum numeric entries at the bottom of the column.
- **Mathematical Term:** Choose how column values calculate: **Add, Subtract, or Multiply**.
- **Add Column Options:** Add as many columns as needed.
- **Option Text:** Enter the label for each column.
- **Input Type:** Select the type of input for each column (see Input Types section).
- **Remove:** Delete any rows or columns you don't need.

Conditional Logic

Conditional logic controls when certain questions appear or how values are set based on previous answers. This helps simplify forms and guide users to only relevant questions.

 **Video Tutorial:** Learn how to add conditional logic to questions in a custom form.
<https://www.loom.com/share/4b610416d921424b8adba78910bc0e0b>

 **Tip:** Build all questions before adding conditions.

 **Note:** Logic can only be applied to these question types:

- Multiple Choice (single or multi select)
- Grid
- Staff Choice
- Grant Source

Add Conditional Logic to Questions

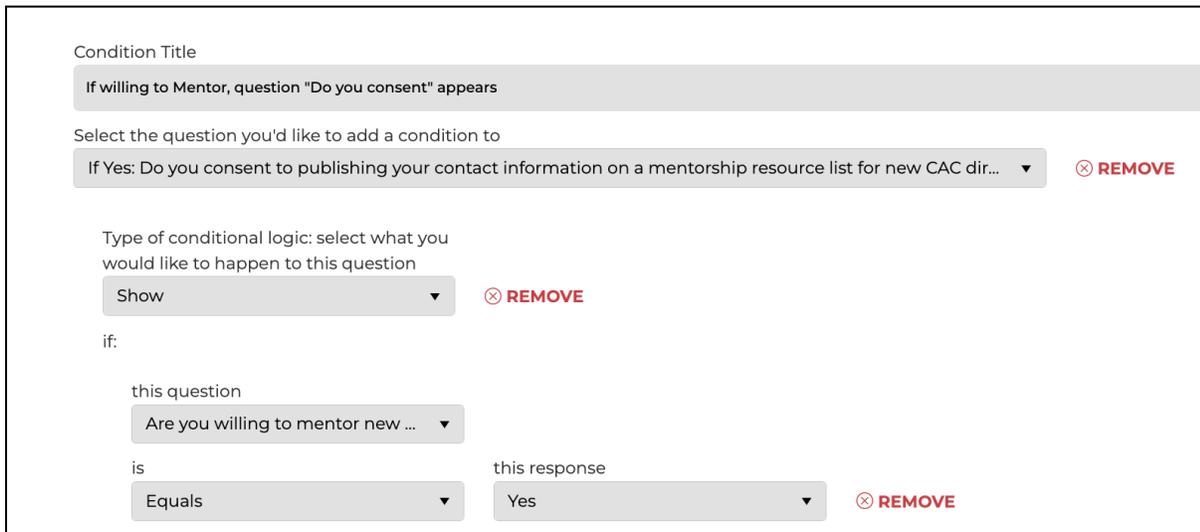
- In **Design Mode**, click the **Conditions** icon (three vertical dots).
 - If you do not see the Conditions icon, contact CM Support to enable conditional logic for your site.
- Click **Add New** to create a condition.
- Click **+Add Conditional Logic Form Questions**
- **Condition Title:** Name the condition so you can identify it later in the grid.
 -  **Tip:** It is helpful to name it something that describes the condition, such as If Yes is selected, the list appears.
- **Select the question you'd like to add a condition to:** Choose the question that will be affected by answers to earlier questions.
- Click **+Add a Condition to this Question**
 - **Type of conditional logic: select what you would like to happen to this question:** Select from the drop down one of the following condition types:
 - **Show:** Display the question when the condition is met.
 - **Hide:** Hide the question when the condition is met.
 - **Set Value:** Automatically enter a value in the question based on a previous



answer.

- Enter the value required.
- **Set as Required:** Make the conditional question required when the condition is met.
 -  **TIP:** Do not set the question as required when creating a question in the design, doing so may block form submission. It is important to make conditional questions only required when the condition is met, otherwise it can make the field required even if it is not visible.
- **Set Minimum / Set Maximum:** Define a minimum or maximum answer that must be met based on a previous answer.
- **IF, Click +Add Condition**
- **This question:** Select the question that's response impacts the logic
- **Is:** Select rule:
 - **Equals**
 - **Is Not Equal To**
 - **Is Greater Than**
 - **Is Less Than**
- **This response:** Options vary based on input values for the question selected.

Example Condition: If someone answers Yes, they are willing to mentor, a question should appear asking "Do you consent..."



 **Tip:**

Click the eyeball icon from the Conditions page to view and test the form with the conditions applied.

Impact of Archiving Questions

- Editing or archiving form design is **not recommended** once a form has begun collecting submissions.
- Archiving question options after submissions are entered does **not** delete any submitted data.
- If a question was used as a **Search Filter Item**, only active (non-archived) options remain available for filtering.
- If an entire question or section is archived, it will no longer appear in the **summary of responses** or the **grid view**.



Form Search/Summary

The **Form Search/Summary** page allows you to view and manage forms organized by **category**, displayed across the top of the page. You can also scroll through the full list of forms grouped by category.

A **search bar** at the top of the page lets you quickly locate a specific form by title or keyword.

Current Forms

The **Current Forms** grid displays all existing forms in your Coalition Manager site.

From this page, you can review form details, edit or duplicate forms, export lists, or view submission activity.

 **Tip:** Use filters or the search bar at the top of the grid to quickly find forms by title, category, or status.

 **Video Tutorial:** Learn how to view, edit, and manage existing forms in the Current Forms grid. <https://www.loom.com/share/2b1d54f8589c4b8eaa0345d8537f54eb>

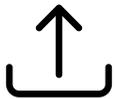
Tabs: Forms are organized into three tabs: Published, Not Published, and Archived.

- **Published:** Forms currently active and available for use.
- **Not Published:** Forms that are saved as drafts or newly duplicated and not yet live.
- **Archived:** Forms that are no longer available for submissions and not visible.

Current Forms Grid Icon Actions

	Copy Link	Copies the form's submission link to your clipboard for sharing via email, your website, or brochures. This link is also used when connecting evaluations or surveys to training events in the Training Module .
	Duplicate	Creates a full copy of the selected form, including all settings, sections, and questions. The duplicated form is saved in the Not Published tab until edited and published.
	Edit Info	Opens the Basic Information page to update general settings such as the form title, category, frequency, access level, or email options.
	Archive	Moves the form to the Archived tab. Archived forms cannot accept new submissions.
	Design	Opens the Design Dashboard to edit, add, or delete questions and sections.



	Preview	Opens the Form Preview to test layout, flow, and question logic. You can enter data to test functionality, but submissions cannot be made from Preview mode.
	Submission Status	Appears for recurring forms (daily, monthly, quarterly, or yearly). Displays whether users have Not Started , Started , or Submitted their form. Staff can use Notify to send reminders to contacts who have not completed submissions.
	Previous Reports	Runs reports to locate individual submissions using filters such as Report ID, Region, Month, or Year.
	Combined Summary	Generates aggregated data from multiple form submissions. Use filters (e.g., Report ID, Region, Year) to review and export summary data.
	Responses	Responses: Opens a grid of completed, in-progress, and archived submissions. You can edit, archive, preview, export to Excel/PDF, or add new submissions.
	Dashboard	Returns to the form's main dashboard.
	Unpublish	Removes the form from active use and moves it to the Not Published tab. Unpublished forms cannot receive submissions but can be edited, archived, designed, previewed, or republished.
	Publish	Makes the form active and visible to users based on its assigned Access Level and settings. Once published, respondents can view and submit the form.
	Add Password	Adds a password to restrict access to edit or read form submissions.
	Remove Password	Deletes the current password. You must enter the existing password to confirm removal.
	Update Password	Update Password: Changes the existing password. You must enter the current password to confirm the update.
	Unarchive	Restores a form from the Archived tab. Once unarchived, the form moves to the Unpublished tab, where it can be edited or published.
	Delete	Permanently removes data. Only Coalition Admins can see and use the delete button. Use with caution - deleted data may not be recoverable. Use Archive instead when possible.

Submission Status Page

The **Submission Status** and **Notify** options appear only for recurring forms configured to collect



submissions on a defined frequency (e.g., monthly or quarterly).

Use this page to view the monthly submission progress for each organization. The Submission Status page displays a grid showing each Contact's submission status for a specific form. All Contacts within the assigned Contact Type or **Access Group/Committee** are listed.

Grid Structure and Actions:

- Each row is a Contact within the assigned Contact Type or **Access Group/Committee**.
- Columns are organized by the form's designated reporting period (e.g., **months, quarters**, etc.). A status of **Submitted, In Progress**, or **Not Started** displays in the row next to each associated Contact.
 - If a form has been **Submitted** or is **In Progress**, you can click the status to open and view that submission directly.
- Use the **Year** dropdown to change the reporting period and view submissions across different timeframes
- Click **Notify** to open your default email program and send reminders to respondents who have not yet submitted their form. This feature allows you to prompt outstanding organizations directly from the grid.

⚠ Note: If the Notify button does not open an email window, ensure that your computer has a **default mail application** set.

Form Dashboard

Each form has its own Form Dashboard, where staff can manage settings, design, view submissions, and access reporting tools.

🎥 Video Tutorial: Learn how to use the Form Dashboard to filter, analyze, and export form submission data. <https://www.loom.com/share/c448e9a5a815489f9dd886d8a5072759>

💡 Tip: Form Dashboard also has icons that can be clicked to: Design, Conditions, Preview, Edit, Duplicate, and Copy Link

⚠ Note: Be sure to **publish your form before sharing the link**—unpublished forms are not visible to respondents.

From the Form Dashboard, you have access to the following pages for the specific form:

Submit Response

Click Submit Response to manually enter a new submission for the selected form.

💡 Tip: This option is useful when staff need to manually enter data from paper forms or offline surveys.

Response/Filter

Search and report on form submissions.

- **Options:** Use the filters to narrow results by date, organization, or custom questions.
 - **Report ID:** Enter one or more unique Report IDs (found in the *View Submissions* grid) to pull specific submissions.
 - **Contact**
 - **Report Duration:** Filter by time period the form was submitted — *monthly, quarterly,*



questions marked as *Display on Summary* or *Searchable Filter Items* will appear in reporting and filters.

⚠ Note: There are additional filter options in the Response/Filter tile. If you are not finding the report you need, try Response/Filter instead.

- **Data View:** Shows totals by question and question type, with percentages for response questions.
 - **Print:** Click here to print the entire report or save as a PDF.
 - **⚠ Note:** You must expand the sections that you want to print/save.
 - **Expand All/Collapse All:** Open or close all sections of the report at once.
 - **Responses:** Displays a grid of individual responses matching your search. Use this view to review or edit submissions.
 - **Other Sections:** If Display on Summary was selected during form design, responses for those questions will be combined and shown here.
- **List View:** Shows individual submissions that meet your selected search criteria.
- **Combined Report:** Combines all questions and responses into one summary view. Includes both totals and percentages for quantitative questions. Export options include:
 - **Export Combined Response:** Export grouped by question to Excel.
 - **Export Individual Responses:** Export the report by Excel and give each individual response.
 - **Export All Responses:** Export to Excel and include counts and percentages for multiple choice, Likert, and yes/no type questions.
- **Graphical Report:** Displays **Pie Charts** for **Multiple Choice, Yes/No, and Likert Scale** questions. These reports provide a quick visual overview of trends and response distributions.
 - Automatically includes all questions matching those response types.
 - Each chart shows the count and percentage for each answer choice.
 - Charts can be printed directly or exported for sharing.
 - **Export as PDF** – creates a printable version of all charts.
 - **Export as Image** – saves each chart as an image file for reports or presentations.
 - **⚠ Note:** Chart colors are automatically assigned by the system and **cannot be customized.**
 - **📺 Video Tutorial:** Learn how to generate and export graphical reports for your forms.
<https://www.loom.com/share/0c14a5ac456c4ce2aec72d7ad6240677>

Saved Report

Access reports that were previously created and saved for reuse. Saved reports keep all selected filters, so you can re-run them later without rebuilding the search.

Previous Reports

Opens a Data Find page where you can view and filter past reports by Report ID, report duration, or month/year.

Edit Requests

The Edit Requests feature allows form designers to control whether respondents can edit their submissions. Form creators can define whether:

- A form is editable after submission,



- How many times it can be edited, or
- If edits require a formal request.

Forms that Require Approval:

- **Edit Request Button:** When edits require approval, respondents will see an Edit Request button after submitting the form.
 - Selecting **Edit Request** opens a short form where the respondent provides a reason for needing to edit.
- **Form Edit Request Email to Coalition Staff:** Submitting this request automatically sends the Form Edit Request Notification email to the addresses listed in the **Form Info** section.
 - The email has a link to the Edit Request.
 - Edit Requests can also be reviewed, approved, or denied from the Edit Requests grid.

 **Tip:** Encourage respondents to save their form link before submitting, allowing them to preview their submission or use it later to request edits.

 **Video Tutorial:** Learn how respondents request and staff approve form edit access.

<https://www.loom.com/share/cfef6ae23e834de79a18de3b9a80d305>

Coalition Staff View

Coalition Staff can manage all form edit requests in the Edit Requests grid. Requests are organized under three tabs:

 **Note:** If the respondent is logged in when submitting an edit request, the system automatically records their name and contact details. If they are not logged in, the request will display as anonymous.

 **Tip:** Check the Edit Requests grid periodically to ensure all pending requests are resolved.

Edit Requests

Coalition Staff can manage all form edit requests in the Edit Requests grid. Requests are organized under three tabs: **Actions Not Taken, Approved, and Denied.**

	<p>Edit</p>	<p>Edit the submitted response.</p> <p>From the Edit page, you can enter text in the “Reasons to Edit Response” field to document the purpose for the change. Check “Indicate if you would like to approve the request” before saving to approve the Edit Request. When this box is checked, the request is automatically approved, and the respondent is notified (if they are a user and were logged in) that they may update their form.</p>
	<p>Preview Response</p>	<p>View the submitted response; you can edit or archive it from this page. This icon is accessible through all tabs.</p>
	<p>Approve</p>	<p>Grants the respondent permission to edit their submission. When checked the request is automatically approved. Respondent receives Form Edit Request Approved email if they are a contact in your system and if they were logged in when they submitted the form.</p>



	<p>Deny</p>	<p>Select this option to automatically deny all edit requests for this form. If the respondent is a Contact in your system and was logged in when they submitted the form, they receive the Form Rejection Notification Email.</p> <p>Check this box When checked, the request is automatically denied. Respondent receives Form Rejection Notification Email email if they are a contact in your system and if they were logged in when they submitted the form.</p>
	<p>Archive</p>	<p>Archive a response.</p>



Time Tracker

The Time Tracker Module allows staff and administrators to manage billed hours, timesheets, and leave requests in one central location.

Billed entries made in **Trainings**, **Technical Assistance (TA)**, and **Project Activity (PA)** automatically transfer into the staff member's **Timesheet** within the Time Tracker Module.

Use the Time Tracker Module to:

- View and edit your timesheet.
- Request or approve time off.
- View progress towards funding/grant allocation goals.
- Submit your time report to a supervisor.
- Create and manage a personal task list.

The Dashboard provides a week-at-a-glance view of your activity and displays the percentage of hours used for the current month (if configured).

Each staff can only see their own Timesheets, PTO requests, and Time Reports, Supervisors and Coalition Admins can view staff timesheets, approve or reject time reports, and manage leave requests for other staff.

⚠ Note: The Time Tracker Module setup varies by organization. Pay periods, PTO accrual rates, funding or billing sources, and FTE calculations may differ by site. Some sites also enable the hours and minutes display.

🎥 Video Tutorial: Overview of the Time Tracker Module — how to navigate, manage time entries, and view dashboards. <https://www.loom.com/share/83aeab854eb840a1b48e04bc18e77667>

Timesheet

The Timesheet tracks billed activities by and can also be used to submit leave requests.

All billed time entries—whether recorded in Project Activity (PA), Technical Assistance (TA), or Training modules—automatically display on the staff member's Timesheet.

The Timesheet provides a centralized view of:

- **Billed Hours** by activity type and funding source.
- **Percentage of Hours Used**, including monthly grant allocations and FTE breakdowns (if configured).
- **Leave Requests**, including earned, approved, and remaining time off.
- **Activity Details**, such as PA, TA, or Training entry ID numbers, funding source, start/end times, and descriptions.

Supervisor Visibility: Supervisors and/or Coalition Admins can view other staff members' timesheets, while individual users see only their own.

🎥 Video Tutorial: Learn how to navigate and use the Timesheet to review billed hours, add leave requests, and view grant allocation details.

<https://www.loom.com/share/48114af438a84ab48aadf28d552369f>



Calendar View

By default, the Timesheet opens in Calendar View, displaying the current work week.

Use the toolbar at the top to switch between the available display options:

- **Day:** View all activities for a single day.
- **Week:** Displays all activities for the selected week (default view).
- **Month:** Provides a high-level overview of all tracked activities for the month.
- **Agenda:** Lists all tracked activities by day with their details, including total hours.
- **Timeline:** Displays a left-to-right hourly timeline for each day, allowing you to see how time is distributed throughout the day.

 **Tip:** Use the arrow icons to move between weeks or click the calendar icon to jump to a specific date range.

Quick Info Boxes

At the top of the Timesheet calendar, several expandable Quick Info Boxes summarize your tracked hours, leave balances, and monthly allocations.

Total Hours for Selected View: The first box displays the total number of hours currently tracked for the selected view:

- **Week view** > Weekly hours currently billed.
- **Month view** > Monthly hours currently billed.
- **Day view** > Hours billed for that day.

 **PTO Information:** This box appears if your site is configured to track Paid Time Off (PTO) accruals and balances. Expand the box to view:

- **Max PTO Earned** - Point-in-time glance at how much PTO currently earned.
- **Total PTO Approved** - Total approved PTO for the year, including anything in the past and future.
- **Total PTO Remaining** - Balance remaining. If a staff member has gone over their earned PTO time, the number will be negative and bolded in red.

Percentage of Hours Used for the Current Month: Percentage of Hours Used (Current Month):

This box shows how much of a staff member's allocated hours have been billed for the current month. A box displays for each funding source used or allocated this month. Expand a box to view:

- **Grant Source:** Name of the funding source.
- **Max Hours (Month):** Monthly allocated hours. This serves as a monthly goal. Coalition Admins set these in *Contact Manager > Coalition Staff > Billing/Grant Source*.
- **Hours Worked/Scheduled:** Total hours billed to that funding source this month.
- **Percentage Used:** Progress toward the monthly allocation goal based on Staff Billing/Grant Source setup.
- **FTE-** Total monthly billed-time goal calculated from the staff member's allocation settings

 **Percentage of Hours Used for Fiscal Year:** This optional feature displays progress toward yearly funding-source goals. When enabled, each funding source shows:

- Yearly allocated hours
- Hours billed year-to-date
- Percentage used toward the annual goal

The layout matches the Current Month view but reflects fiscal-year totals instead.



Tip: Show Business Hours (Sticky Display Setting): This button is displayed at the bottom of the Timesheet on CM sites where hours and minutes are used for billed time. When selected, Timesheet view limits the display to standard work hours (8:00 AM to 5:00 PM).

- Once selected, this preference remains saved. Each time you return to the Timesheet, it automatically displays according to your last selection—no need to reselect it each session.

Activity Blocks

Each activity block displayed on the Timesheet represents a billed entry of time worked. Activity blocks are automatically generated when hours are recorded in Project Activity (PA), Technical Assistance (TA), or Training, and are transferred directly into the Timesheet for tracking and reporting. Entries may also be created manually within the Timesheet to capture general work or leave time.

When activities are transferred from PA, TA, or Training, related information—such as title, funding source, activity type, and billed hours—is automatically filled in based on the original record. Manually created entries require these details to be entered by the user.

Tip: Double-click an activity block to view or edit its details (if the Time Report has not yet been submitted).

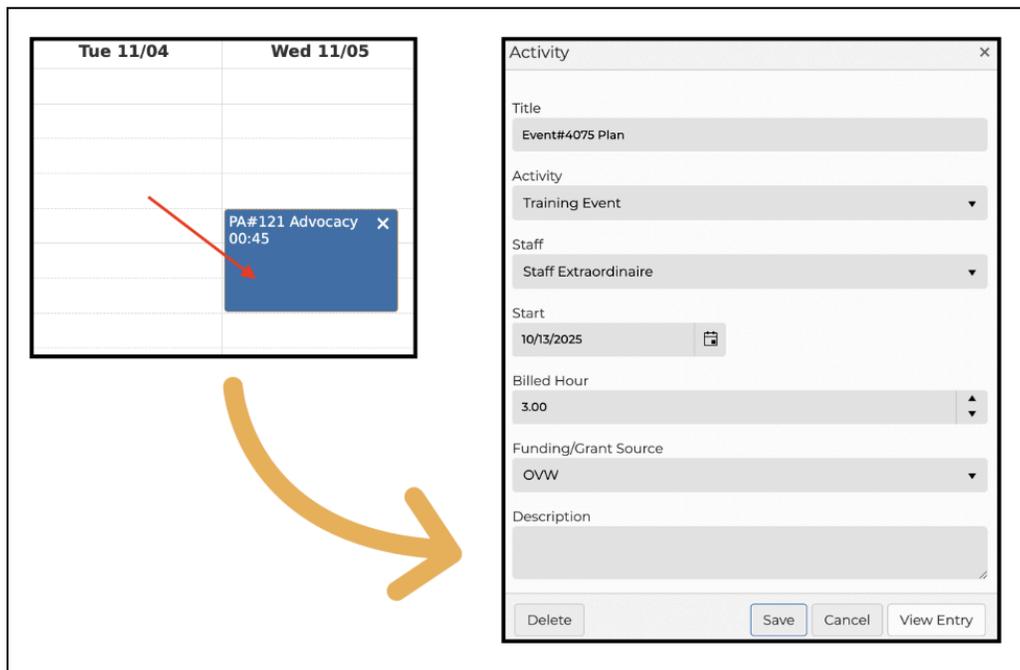
Note: Edits made here automatically update the corresponding entry in PA, TA, or Training.

When clicked, each Activity Block displays:

- **Title:** If transferred from a module, the PA, TA, or Training ID number will display.
- **Activity type:**
- **Staff name**
- **Funding source (grant attributed)**
- **Start and end times**
- **Billed hours**
- **Description**

Add Entries on the Timesheet

Double click anywhere on the timesheet to create a billed entry. Entries created directly within the Timesheet are **not linked** to other modules. These are used to record internal time or leave time that does not originate from a PA, TA, or Training record.



The image shows a screenshot of a Timesheet interface. On the left, a grid displays two columns for dates: 'Tue 11/04' and 'Wed 11/05'. A blue activity block is visible on Wednesday, 11/05, with the text 'PA#121 Advocacy' and '00:45'. A red arrow points from this block to the right, where a detailed 'Activity' form is shown. The form contains the following fields: Title (Event#4075 Plan), Activity (Training Event), Staff (Staff Extraordinaire), Start (10/13/2025), Billed Hour (3.00), Funding/Grant Source (OVW), and Description. At the bottom of the form are buttons for 'Delete', 'Save', 'Cancel', and 'View Entry'.



Two main types of time are entered **directly** on the Timesheet:

- **Paid Leave (PTO):** Leave time tracked through the PTO feature.
- **Activities:** Administrative or internal work that does not require entry in the TA, PA, or Training modules.

Add a New Activity Entry

To add a general time entry directly on the Timesheet:

- **Double-click** an empty space on the calendar.
- In the pop-up window, enter the following details:
 - **Title:** Enter the task or activity name.
 - **Activity:** Select from the dropdown list. (*Configured in System Configuration > Time Tracker > Time Activities.*)
 - **Staff:** Your name auto-fills automatically.
 - **Start/End Dates:** Select the appropriate dates and times (if hours are enabled).
 - **Billed Hours:** Enter total hours (only enter hours **per day**; maximum 24 per activity entry. For reoccurring time, select Reoccurring in the next field).
 - **⚠ Note:** If you create an entry spanning multiple days and do not use the **Recurring** feature, the system will include the entire day (24 hours) not just the working hours.
 - **Recurring:** If needed, select daily, weekly, or monthly recurrence and choose an end date.
 - **Daily** - Occurs at the same time **every day** for the time period selected (will include all days selected, including weekends)
 - **Weekly** - Occurs at the same time and **on the same day of the week** for the time period selected
 - **Monthly** - Occurs at the same time and **on the same date of the month** for the time period selected
 - **Description:** Optional notes.

Request or Record Time Off (PTO)

Leave Time must always be entered directly from the **Timesheet calendar**. It cannot be added through the TA, PA, or Training modules. This is where staff record time off or submit requests regardless of whether their selected Activity Type requires approval.

- **Double-click** an empty space on the calendar.
- In the pop-up window, complete the following fields:
 - **Title:** Name of the leave request.
 - **Activity:** Select a leave type from the dropdown list.
 - Leave types are configured by your Coalition Admins in **System Configuration > Time Tracker > Time Activities**.
 - **Staff:** Your name auto-fills automatically.
 - **Start/End Dates:** Select the appropriate dates and times (if hours are enabled)
 - **Billed Hours:** Enter total hours (only for recurring, enter hours **per day**; maximum 24 per activity entry. For reoccurring time, select Reoccurring in the next field).
 - **⚠ Note:** If you create an entry spanning multiple days and do not use the **Recurring** feature, the system will cap each entry at 24 hours.
 - **Recurring:** If needed, select daily, weekly, or monthly recurrence and choose an end date.
 - **Daily** - Occurs at the same time **every day** for the time period selected (will include all days selected, including weekends)
 - **Weekly** - Occurs at the same time and **on the same day of the week** for the time period selected
 - **Monthly** - Occurs at the same time and **on the same date of the month** for the time period selected



- **Description:** Optional notes.

Activity Type Settings

Activity Types are set up by Coalition Admins in **System Configuration > Time Tracker > Activity Types**. Each Activity Type can require approval, require billing, and/or optionally function as PTO. These selections impact how information is tracked in the Timesheet.

- **Is Approval Required?:** If the Activity Type was designated to require approval, the entry appears on the Timesheet as Pending until a Supervisor or Admin approves it. The assigned supervisor (set in Contact Manager > Staff List > Select Staff) automatically receives an email notification when the request is submitted.
- **Is Billed?:** If the Activity Type is set as billed, staff must select a funding source when entering time as a Timesheet Activity/Leave Request.
- **Is PTO?:** If the PTO Accrual feature is turned on, and if the Activity Type is designated as PTO, the system tracks leave request hours, accruals, and balances. Only approved leave is included in the PTO balance.
 - **Note:** Not all time activities/leave request types may be categories at PTO.

Add PTO Accruals to Timesheets

Coalition Manager can track staff time-off accruals and leave balances directly within the Timesheet. This feature must be enabled by **CM Support** and configured by your **Coalition Admins** before it becomes available to staff.

When PTO Accruals are active, your Timesheet will display:

- Hours of PTO Earned for the Year
- Hours Approved
- Remaining Balance

Video Tutorial: Learn how the PTO function works and how to set up accrual rates for staff leave tracking. <https://www.loom.com/share/f188b61e193d4088844a71a8021a9e5b>

Video Tutorial: See how staff can view their leave time accruals and remaining balances in the Time Tracker module. <https://www.loom.com/share/43a05996c6a24dfcaa313bd24a6bd7a5>

Task List

Use the Task List to organize work items and track progress on upcoming tasks. Tasks are for reference only and do not appear on timesheets or in other modules.

The Task List includes two tabs:

- **Incomplete:** Displays all active tasks.
- **Completed:** Displays finished tasks. Marking a task as completed automatically moves it to this tab.

Task Fields:

- **Staff:** Assign the task to yourself or another staff member.



- **Title:** Enter a brief name or description of the task.
- **Anticipated Completion Date:** Enter manually or select a date/time from the calendar tool.
- **Task:** Add details or notes. Text can be formatted and include bullets, images, or hyperlinks.

💡 **Tip:** Use the Task List to manage personal and team to-dos—it's a great way to track progress without affecting your timesheet data.

👤 **Video Tutorial:** Learn how to create, assign, and manage tasks using the Time Tracker Task List. <https://www.loom.com/share/ff312a10dfa14f13a5bf671c112ed941>

Time Report

The Time Report is used by staff to submit their timesheets for supervisor approval and processing.

- Supervisors and administrators can review, approve, reject, or finalize submitted reports for payroll, funding, or grant tracking purposes.
- Each staff member must review and submit a Time Report at the end of every pay period.
- All billable activities entered in Technical Assistance (TA), Project Activity (PA), or Training modules flow automatically into the Time Report, as well as anything entered directly into the Timesheet.

⚠️ **Note:** Any billed time added after Time Report submission will not sync to the Time Report. Supervisors must reject the report before new hours can be included.

💡 **Tip:** Always verify that all activities and hours are correct before submitting. Once submitted, only supervisors can unlock reports for edits.

👤 **Video Tutorial:** How to Generate a Time Report: <https://www.loom.com/share/4efb84dccb684538877348789c4c90d7>

Submit a Time Report

Submit a timesheet for supervisor approval:

- **PayPeriod:** Select the correct Pay Period from the dropdown menu.
 - Pay Periods automatically generate in your system based on the setting in System Configuration. As a new pay period is reached, the dates will be displayed in the list.
- **Organization Staff:** Your name auto-fills.
 - Supervisors can view reports for staff they supervise.
 - Organization Admins can view all Organization Staff
- **Review all listed activities for accuracy and make edits if necessary.**
 - If edits are needed, they must be made in the **original entry** (PA, TA, or Training) **before submitting** the report for approval.
 - Once submitted or approved, edits made to an activity will **not update** the Time Report automatically.
 - 💡 **Tip:** To locate and edit entries quickly, open the **Activity Summary** section and add the **Activity ID** column using the ellipsis (⋮) menu.
 - After making changes, **return to the Time Report**, reload, and click **Search** again to reflect updates.
- **Submit for Approval:** Once all details are confirmed, scroll to the bottom and click Submit for Approval.

When a Time Report is submitted:

- **First Approval:** The Supervisor listed in the staff member's **Staff Details** profile automatically



receives a **Time Sheet Submission Notification** email with a link to the report.

- If no supervisor is assigned, the notification is sent to the address listed in **System Configuration > Specific Info > Time Sheet Management**.
- **Second Approval:** After the first approval, an additional **Time Sheet Submission Notification** email is sent to any addresses listed **System Configuration > Specific Info > Time Sheet Management**.

First Level Supervisor Review, Rejection, and Approval

Supervisors should carefully review each submitted Time Report for accuracy before approving.

- **Reject:** If changes are needed, click **Reject** so the staff member can make corrections and resubmit.
 - When rejected, the staff member receives a **Time Sheet Rejected** email including any comments provided by the supervisor.
- **Approve:** If the report is correct, click **Update Approval**, enter approver's name and date, and click **Update** to complete approval.
 - Once approved, the staff member receives a **Time Sheet Approved** email confirming the approval and the second approval email is sent

Second-Level Approval or Processing

If your site uses a secondary approval workflow:

- The second-level reviewer automatically receives a **Time Sheet Submission Notification** once the first supervisor approves the report.
- They access the same report, confirm accuracy, and click **Update Approval** to finalize processing, entering their own name and date.
- The staff member receives a **Time Sheet Approved** email.
- Once all approvals are complete, the report is marked as **Fully Approved** and available for exporting for payroll processing, grant reporting, or etc.
- 🎥 **Video Tutorial:** Learn how multi-level approvals work for sites with secondary processing. <https://www.loom.com/share/b7b00607d1d446a8a2a381776f07f727>

Edit or Correct Time Reports

Once a Time Report is submitted, it becomes **locked** and cannot be edited. To make changes:

- A Supervisor or Admin must reject the Time Report before any edits can be made.
- After rejection, edits can be made directly within Time Tracker or within the associated entry in PA, TA, or Training modules.
- Once the edits are complete, staff need to resubmit the time report for supervisor approval.
- 🎥 **Video Tutorial:** Learn how submitted timesheets are locked and how supervisors can reject them for editing. <https://www.loom.com/share/d9ba15031b724b21af146419f0d2253b>

Clickable Activity IDs

Supervisors can use the **Activity Summary Grid** in the Time Report to quickly locate related PA, TA, or Training entries by adding the **Activity ID** column using the ellipsis (⋮) menu.

Each Activity ID is a hyperlink — click it to open the corresponding entry in a new window. View or edit details and make updates directly within that entry screen.

💡 **Tip:** Clickable Activity IDs are the fastest way to find and edit specific activities without re-running your report.

🎥 **Video Tutorial:** Learn how to use clickable Activity ID links to quickly view or edit entries from



your time report. <https://www.loom.com/share/2b6dd59671aa49d7ad97fee8435c3462>

Reject a Time Report

Supervisors click Reject, enter a comment, and the staff member receives a Time Sheet Rejected email with instructions to edit and resubmit.

 **Tip:** Consider using an internal pre-submission checklist to prevent repeat rejections (e.g., verify billed hours, funding source, and staff involvement).

Export Time Reports:

Time Reports can be exported in multiple formats for **recordkeeping, payroll reconciliation, or audit purposes**. Supervisors and admins can select the export type based on their reporting needs.

- **Export All Sections:** Generates a complete report with all activities, billing details, and summaries.
- **Export Without Activities:** Summary with timesheet detail, grant summary, and weekly totals.
- **Export Hour Summary:** Totals by funding source.
- **Export by Section:** Export only selected grids if needed.
- **Print:** Add a title, then print or save as PDF.

 **Tip:** Export a copy of each approved report every pay period for your records or grant documentation.

Report Grids

Each Time Report includes several data grids that summarize time activity:

- **Funding Sources:** Daily totals by funding source.
- **Activities:** Daily totals by activity type.
- **Activity Summary:** All activities (PA, TA, Training, and leave). Columns can be added/removed.
 -  **Tip:** Add the column Activity ID for a hyperlink to the entry.
- **Grant Summary:** Total hours by funding source and FTE percentages.
 -  **Yearly FTE** percentages will be included if the yearly FTE feature is turned on.
- **Other Activities:** Totals for directly entered items (e.g., administrative work, leave).
- **PTO Balance:** Remaining accruals by leave type (if enabled).
- **Week Totals:** Total hours worked per week for the pay period.

Time Search

Use the Time Search tool to view billed hours, leave time, leave balances, and pending requests. This page provides a combined overview of staff activity across the Time Tracker, Project Activity (PA), and Technical Assistance (TA) modules.

- Staff can view only their own billed time.
- Supervisors can view timesheets for staff they supervise.
- Coalition Admins can view all staff timesheets.

 **Video Tutorial:** Learn how to search billed hours, view leave balances, and run time summary reports using Time Search. <https://www.loom.com/share/1caa9ec3be244798bd4ca9f2cd8a4875>



Run a Time Search

- Apply filters such as:
 - **Date Range:** Leaving the date range blank will return all available results.
 - **Staff Name**
 - **Activity Type**
 - **Funding Source**
- Click **Filter** to generate results.

Results can be displayed in two formats:

- **Data View:** Expandable sections showing total hours, FTE, and other aggregated information.
 - **List View:** Lists daily totals for and exportable monthly reports.
-

View Pending or Approved Leave Time

In the **Activities** section, add the **Is Pending?** column using the ellipsis (...) menu. Column values indicate:

- **Pending:** Awaiting supervisor approval.
 - **No:** Approved.
 - **N/A:** Leave type does not require approval.
-

View Monthly Time Summaries

If enabled, you can view and export monthly time summaries showing:

- Dates
- Total hours
- Grant allocations

These summaries can be exported to Excel, including employee and supervisor signature lines. Staff without admin access can only view their own summaries.

View Annual Leave Balances:

If your site uses **PTO Accruals**, you can run an **Annual Report** to view leave balances.

This report displays totals for:

- Earned leave
- Used leave
- Remaining leave

Expand the **PTO Balance Remaining** section to view detailed balances for each staff member.

Time Requests

Admins Admins and Supervisors can view, edit, approve, or reject time-off requests submitted by other staff.

When a request is submitted, the designated supervisor automatically receives an email notification with a direct link to the request in this section.

 **Video Tutorial:** Learn how to review, edit, and approve or reject time-off requests in the Time Tracker module. <https://www.loom.com/share/34758038eea6482f95d0992f2dfa9e79>



Manage Time Requests

Use the **Time Requests Grid** to manage submissions by status:

- **Awaiting Action:** Pending approval.
- **Rejected:** Denied requests (includes reason for denial).
- **Approved:** Approved requests.

To approve or reject a request:

- Click the ✓ check mark to approve, or the ✗ to reject.
- If rejecting, enter the **reason for denial** (for example, "Office closed for holiday").
- The staff member automatically receives an email confirming the decision and any supervisor comments.

💡 **Tip:** Supervisors can edit leave requests before approving them to adjust dates or hours if needed.

Bulk Approval: Select multiple requests and click Bulk Approval to approve several submissions at once.

Edit or Delete Leave Requests:

Once a leave request has been submitted, it **cannot be edited**.

If changes are needed, the request must be **deleted and resubmitted**.

To delete a PTO request:

1. Go to your **Timesheet**.
2. Find the leave entry and **double-click** it.
3. Click **Delete** to remove the request.

⚠️ **Note:** If the Timesheet has already been submitted, the request cannot be deleted until the timesheet is **rejected by a supervisor**.

🎥 **Video Tutorial:** Learn how to delete approved PTO requests directly from your timesheet.

<https://www.loom.com/share/22cc46a0d0d54498a3c7aca7995089b3>

Submission Status

Supervisors and Coalition Admins can use the Submission Status Grid in the Time Tracker Module to monitor timesheet progress and approval stages.

Each record shows the current status for staff timesheets within a selected pay period.

- **Not Submitted:** Timesheet has not yet been submitted for approval.
- **Not Approved:** Timesheet has been submitted but not yet approved.
- **First Approved:** Timesheet has been approved by one supervisor.
- **Second Approved:** Timesheet has been approved by two supervisors (fully approved).

Click any of the status links (**Not Approved**, **First Approved**, or **Second Approved**) to open and review the submitted report.

Access Permissions:

- **Supervisors:** Can view timesheets for staff they directly supervise.



- **Coalition Admins:** Can view timesheets for all staff.
- **Staff (non-admin):** Can only view their own submission status.

 **Tip:** Use the **Report Duration** filter to select a specific pay period and narrow your results by staff if needed.

 **Video Tutorial:** Learn how to review staff timesheet statuses and track which reports are pending, partially approved, or fully approved.

<https://www.loom.com/share/b7b00607d1d446a8a2a381776f07f727>



Resource Manager Module

The **Resource Manager** Module is used to upload, organize, and share resources such as documents, presentations, videos, and links.

- Coalition Staff can make resources available to users or to the public through a secure, centralized library.
- Resource activity is tracked automatically so you can monitor views and downloads.
- Public resources can be shared through API keys embedded in your website, the Resource Summary link, the Resource Search link, or by sharing a direct link to an individual or group of resources.

⚠ Note: Coalition Admins can access the Resource Summary and Resource Search public links in **System Configuration > Your Site Specific Info > Share Public Links**.

🎥 Video Tutorial: Learn how to upload, organize, and share resources publicly or internally using the Resource Manager module. <https://www.loom.com/share/aae2fae05c8e4c3ca95dee984a2db3dd>

Dashboard

The Resource Manager Dashboard gives quick access to all resource tools and recent activity. The left menu buttons mirror the main navigation options in the module for easy access.

Each **Resource Category** displays as a tile showing the **category name** and the **number of resources** within that category. Clicking a category tile opens the **Resource Summary** page and automatically filters the view to display only the resources assigned to that category. Toggle the results between List View and Data View to see the resources in different display modes.

Resource Search

The Resource Search page provides an easy way to browse and locate resources uploaded to your Coalition Manager site.

This page can also be shared publicly through your website or other communications, allowing the general public to access resources marked with the **Access Level: Open to All**.

🎥 Video Tutorial: Learn how to use the Resource Search page to browse, filter, and locate resources by category, keyword, or file type. <https://www.loom.com/share/b3089eb2e26a4faf8816a0e5494c9e2e>

Search Options on the Resource Search Page

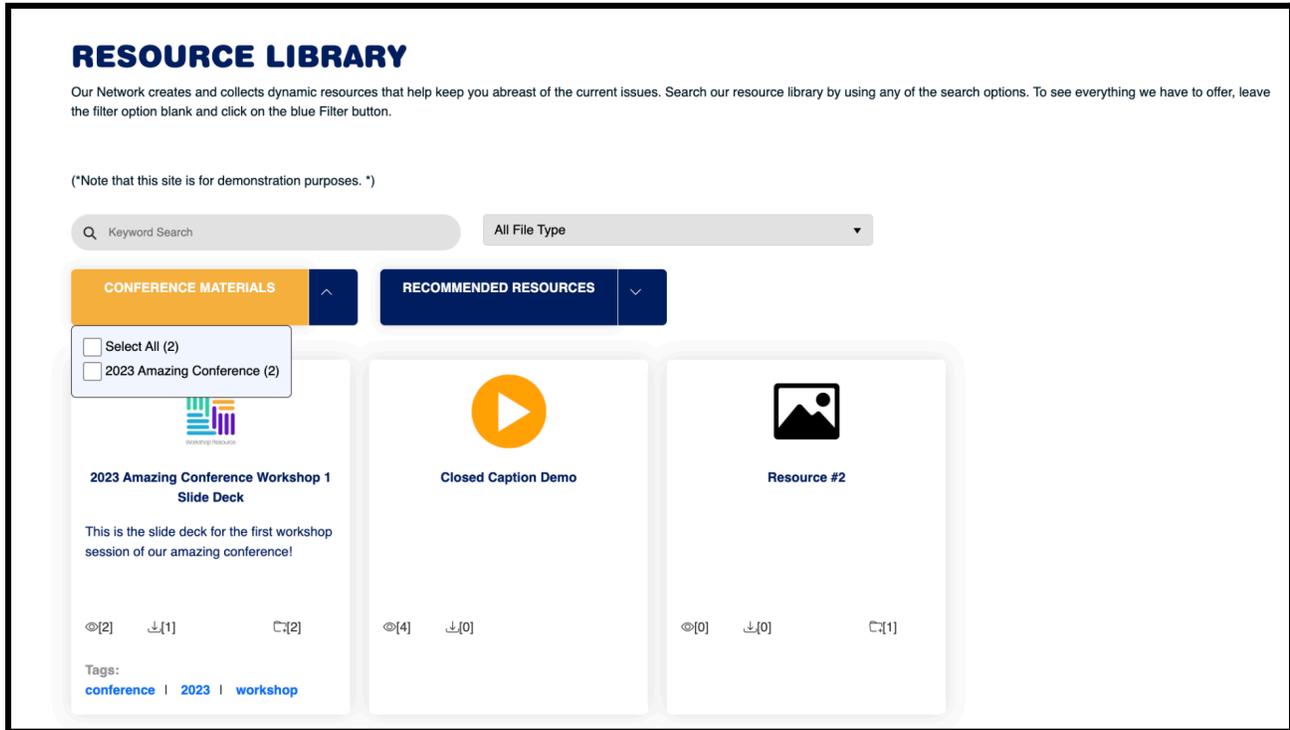
Category and Subcategory Search: Select a Category tile to view all resources in that category. Click the carat (∧) to display Subcategories. Selecting multiple categories or subcategories automatically filters results.

Keyword Search: Type a word or phrase into the Search bar to find resources that include the keyword in the title, description, or tags.



File Type Filter: Use the File Type dropdown to filter by file types such as File, Link, or Embed Code.

Tag Search: Click any tag at the bottom of a resource tile to open a results page showing all resources with that same tag.



New Resource

Use the New Resource page to add new files, links, or embedded media to the Resource Manager library. Resources can be added individually or grouped together in a Resource Group.

 **Video Tutorial:** Learn how to add a new resource.

<https://www.loom.com/share/35c6acd8aec34430a240ebc112d40a28>

Add New Resource

- Click **New Resource**
- **“Is this a group of resources?”** Select this option if you want to group resources together. When selected, additional fields appear:
 - **Title of Resource Group:** Enter a new group name or select an existing group.
 - **Description of Group:** Add a short description that appears at the top of the group page.
 - **Thumbnail Image:** Upload an image to represent the group.
 - Recommended size: 180 × 160
 - Accepted file types: PNG, JPEG, JPG
 - If no image is uploaded, a default image displays.
 - **Save and Add New:** After adding one resource, click **Save** or **Save and Add New** if you have additional resources to include in the group.



Resource Groups

When should you use Resource Groups?

Use Resource Groups to keep related files, links, or videos together under one group title. This keeps all materials for a topic, training, or campaign in one place (for example: slides, handouts, and recordings from the same event).

You can also share a direct link to a Resource Group page or embed it on your website.

Unlike Resource Categories, you do not need to set up groups in System Configuration ahead of time. You can create a new group while uploading a resource or add resources to an existing group.

Resource Group Tiles:

- Each resource inside a group can still be searched individually.
- When opened, the resource links to the Resource Group Page, which shows every item in that group.
- A folder icon appears on each resource tile to show it belongs to a group; it also displays how many items are in the group.
- Click any tile in the group to open the full Resource Group Page.

Note: The group itself does not appear as its own tile.



Associated Contacts: Training Records

Learn how administrators of contact organizations can view training records of associated contacts

👁️[5] 🗨️[3]

Resource Group Page Appearance:

The Resource Group Page displays the group's image and description at the top, followed by all included resources with their titles, images, and short descriptions. Users can view, download, or open the link, depending on the file type and access settings.

Associated Contacts

Administrators of Member/Contact organizations can view the records of associated contacts. In other words, they can view records of individuals who are not included in their organization's staff list.

 <p>Associated Contacts: Training Records</p> <p>Learn how administrators of contact organizations can view training records of associated contacts</p> <p>👁️ 5</p>	 <p>Associated Contacts: Contact Details</p> <p>Contacts can view but not edit associated contact details.</p> <p>👁️ 5</p>	 <p>Associated Contacts: Custom Forms</p> <p>Contacts can view the form submissions of their associated contacts.</p> <p>👁️ 4</p>
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- **Resource Type:** Select one of the following options for your resource:
 - **File:** Upload a document or media file.
 - **Resource File:** When *File* is selected, a Resource File field appears below to upload the desired file from your computer.
 - **Closed Captioning:** When uploading a video file (i.e. WMV, MP4, etc.), an additional field allows you to upload caption files in *.VTT* or *.SRT* format. Viewers can enable captions when watching the video.
 - **Link:** Adds a field to enter a URL. Include the full web address, starting with *http://* or *https://*.
 - **Embed Code:** Used to embed videos (for example, *YouTube* or *Vimeo*). Paste the embed code directly into the provided field.
- **Title:** Enter the title of the resource.
- **Intro Text:** (*Optional*) Add a short description for the resource. Keeping this under **250 characters** is recommended to ensure it displays properly.
- **Resource Category:** Select from the dropdown to organize the resource. Categories are customized in System Configuration.
- **Resource Sub Category:** If applicable, select a subcategory after choosing a category. Subcategories appear only if your site uses them and can also be customized in System Configuration.
- **Thumbnail Image:** Upload an image to represent the resource.
 - **Recommended size:** 180x160.
 - **Accepted file types:** PNG, JPEG, JPG.
 - If not uploaded, a default image displays.
- **Tags:** Add descriptor words to categorize the resource. Separate multiple tags with commas. Tags help users locate related materials across the site.
 - Tags can be searched from both the **Resource Search** and **Resource Library** pages.
 - Tags also display at the bottom of a resource's tile.
 - Clicking a tag opens a page displaying all resources with the same tag, allowing users to browse related content easily.
- **View Only:** Appears when "File" or "Embed Code" is selected as the Resource Type.
 - Checking this box prevents the resource from being downloaded.
 - The resource title will not be clickable; users must click **View** to open the file in their browser.
- **Is this resource accessible?:** An internal field used to indicate ADA accessibility status. This setting is **not visible to users** and is for internal tracking only.
- **Resource File Access:** Select from the dropdown menu who can view the resource:
 - **Open to All:** Visible to anyone, including public visitors, logged-in users, and those with a direct link.
 - **All Contact Types with Login:** Visible to all logged-in users.
 - **Specific Contact Types with Login:** Choose one or more contact types, organizations, or staff.
 - **Add Specific Contact:**
 - **Contact Type:** Select the Contact Type(s) who should have access. If no specific Contact or Contact Staff restrictions are added, all contacts within that Contact Type will have access.
 - **Contact:** Select an individual Contact (organization) to narrow access. If the Contact is an organization and no Contact Staff are selected, all staff under that organization will have access.
 - **Contact Staff:** Select specific staff (if applicable) to further restrict access to only those individuals.
 - **Only Staff:** Visible only to staff within your organization
 - **Specific Staff:** Limit visibility to staff assigned to an Organizational Team (configured in System Configuration).



- **Specific Access Groups/Committees:** Restrict visibility to designated Access Groups or Committees.
 - **Limit Access to Resources for Coalition Staff:** By default, **all Coalition Staff** can view all resources. To restrict access, staff must be assigned to an **Access Group** and that group must be linked to the specific resource.
 - At least one staff member must be included in the Access Group for restrictions to take effect.
 -  **Video Tutorial:** Learn how to restrict resource access for specific staff using Access Groups and Committees.
<https://www.loom.com/share/b38661fbb0904287ba333d4ce3d7766e>
- **Link Only:** Selecting Link Only makes the resource accessible **only by direct link**.
 - The resource will not appear in public searches, API connections, or user dashboards. This option is best used for materials meant to be shared privately.
- **Survey Link:** Copy and paste a survey from Custom Forms here to send a follow-up or evaluation form to users who view the resource while logged into Coalition Manager.
 - When the resource is accessed, the user receives an email containing a link to complete the survey.

Resource Summary

The **Resource Summary** page provides search and reporting tools for all uploaded resources.

 **Video Tutorial:** Learn how to search, filter, and report on uploaded resources using the Resource Summary page. <https://www.loom.com/share/49a5eab5299c4a499c19967f656cf5c4>

Depending on who is viewing the page, different things will display:

Coalition Staff View

When viewed by Coalition Staff, additional data—such as total views, downloads, and file counts—can be displayed or exported for reporting and analysis.

- Staff can use advanced filters to locate and analyze specific resources.
 - **Keywords:** Search words or phrases found in any title or description
 - **Title:** Search by one or more words in the resource title
 - **Intro Text:** Search by words or phrases in the description
 - **Uploaded Date:** Filter by the date range a resource was uploaded
 - **Access Date:** Filter by a date range for when a resource was accessed
 - **Access:** Filter by access level (e.g., *Open to All*, *Staff Only*)
 - **Contact Type > Contact > Contact Staff:** Filter by Contact Types, Specific Contacts, and Specific Contact Staff that accessed the file
 - **Resource Category and Resource Subcategory**
 - **File Type:** Filter by file format (Link, File, or Embed Code)

Resource Summary Reports for Coalition Staff:

Three grids display from the filtered search.

- **Resource Files:** Displays all resources that match your selected filters.
 - **Grid Column Options:** Upload Type, Title, Intro Text, Resource Category, Resource Sub Category, File Access, Creation Stamp, Total Views Count, Total Download Count, Tags, and Resource Group
 - **Grid Icons:** Edit, Archive, Browse/Download
 - **Access List:** Opens a detailed page showing all access activity for the selected



resource. The Access List displays every view or download, including who accessed it, when, and from which IP address.

- **Access List Columns Options:**
 - **Activity Date:** Date and time the resource was viewed or downloaded.
 - **Access By (Contact):** The Contact who accessed the resource. “Anonymous” will display if the resource was accessed by the general public.
 - **Access By (Contact Staff):** Staff member associated with the accessing Contact Organization.
 - **Access By (Coalition Staff):** Name of Coalition Staff who accessed the resource.
 - **Activity:** Type of activity performed: view or download.
 - **IP Address:** The IP address used when accessing the resource.
- **Resource Files by Categories:** Groups resources by Resource Category to review all files within each category.
 - **Grid Column Options:** Title, Intro Text, Resource Category, Resource Sub Category, and Creation Stamp

File Counts by Type: Displays each Resource Category with the total number of files in that category.

Viewing Results: Results from any report can be viewed in two formats

- **Data View:** Displays results in a sortable grid with customizable columns. This view is best for exporting or analyzing totals such as views and downloads.
- **List View:** Displays a tile for each resource, grouped first by Category and then by Subcategory.
 - A **Copy Link** button appears for each subcategory, allowing staff to share direct links to that subcategory’s resource page.

User and Public View

When viewed as a logged-in user or through a public link, the page serves as a searchable list of available resources.

The screenshot displays the 'RESOURCE LIBRARY' interface. At the top, it states: 'Our Network creates and collects dynamic resources that help keep you abreast of the current issues. Search our resource library by using any of the search options. To see everything we have to offer, leave the filter option blank and click on the blue Filter button.' Below this is a note: '(*Note that this site is for demonstration purposes. *)'. The 'Search Options' section includes a text input for 'Keyword(s) if multiple keywords, separate by commas', and two dropdown menus for 'Title' and 'Intro Text'. There are also dropdowns for 'Resource Category' (set to '--Any resource category--') and 'File Type' (set to '--Any File Types--'). A blue 'FILTER' button is positioned below these options. On the right side, there are links for 'DATA VIEW' and 'LIST VIEW'. Below the search area, there is a button that says 'Click here to give this a title before print' and a blue 'PRINT' button. The 'RECOMMENDED RESOURCES [4]' section shows two resource tiles. The first tile is titled 'Hiring an Interpreter' and includes a 'Quick View' link with a count of 13 and a 'Download' link with a count of 9. The second tile is titled 'Technology Safety' and includes a 'Browse' link with a count of 10 and a 'Tags' section listing 'technology' and 'nnev'.



Current Resources

The Current Resources page lists all resources uploaded to your Resource Manager, including active and archived items. Use this page to search, view, manage, and update existing resources.

 **Video Tutorial:** Learn how to view and manage your existing resources.
<https://www.loom.com/share/627b9eb7d9094a44bdf41daa0001a9a9>

Add New: At the top of the page, there is a button where you can go to the page to add a new resource.

Tabs: You can view **Active** and **Archived** resources, as well as **Resource Groups**, by clicking the tabs at the top of the grid to view other grids.

Active Resources Grid

Each row in the grid represents one resource.

- **Copy Link:** Copy the direct link to share the resource.
- **Edit:** Update details such as title, description, or access level.
- **Archive:** Move the resource to the archive tab to remove it from active searches and current usage.
- **Download/Browse:**
 - If the resource is a file, click **Download** to save it to your computer.
 - If the resource is a link, click **Browse** to open the web page.
- **Access List:** View who has viewed or downloaded the resource.
 - Displays date/time accessed and whether the item was **viewed** or **downloaded**.
 - Logged-in users show by name, public users appear as Anonymous.

Archived Resources Grid

Each row in the grid represents Archived resources.

Group Grid

The Group Grid lists all Resource Groups and the number of items in each group.

- **Copy Link:** Copy the direct link to share the entire group's resource page.
- **Edit:** Update the group name, description, thumbnail image, or resources included.
 -  **Note:** Editing a Resource Group does not affect the individual resources' access levels or file settings. Changes apply only to the group's shared display and description.



Combined Reports Module

The Combined Reports module brings data from multiple modules into a single, consolidated report. Use this module to view summaries and totals across Project Activity (PA), Technical Assistance (TA), Trainings, and Time Tracker entries, including staff hours, leave time, and billed activities.

This module helps staff review activity across modules in one place to track outcomes, workload, and funding impact. The Payment Log section allows you to run filtered reports on payments received from Contact Manager, Training, and Donor modules.

⚠ Note: Access to the Combined Reports module may be restricted. If you do not see this module, contact your organization's Coalition Manager Administrator to request access.

Report Search/Data Summary

The Report Search/Data Summary tool combines results from Project Activity, Technical Assistance, Training Events, and Time Tracker into a single report view. Use this tool to search, filter, summarize, and export data entered anywhere in your Coalition Manager site.

You can apply both general filters and module-specific filters to narrow results.

🎥 Video Tutorial: Demonstrates how to filter, save, and export Combined Reports across modules. <https://www.loom.com/share/289b508591a243018bb00ce738e1a261>

General Filters: Use these filters to control the scope of your report. Selecting more options narrows the results.

- **Report Duration:** Select a date range.
 - If **Time Period** is selected, enter start and end dates.
 - If no dates are entered, all available dates are included..
- **Applicable Report Sections/Summaries:** Select which result sections to include. If none are selected, all available result sections will be displayed.
- **Staff:** Select one or more staff to narrow the search by staff member(s). Includes entries with billed time or those where the selected staff member is listed as Reporting Staff.
- **Funding/Grant Source:** Filter by one or more billed funding sources.
- **Modules:** Select PA, TA, Training, or any combination.
- **Report Type:** Choose **Regions** or **Programs** to organize results.
 - **Program:** Select the relevant Contact Type(s), Contact(s), and Contact Staff.
 - **Regions:** Select one or more regions.
- **State/Counties:** Filter by specific State(s) and/or Counties.
- **Keyword(s):** Search text entered in Executive Summary or Notes fields.

Project Activity (PA) Filters:

- **Project:** Filter by projects recorded in **Project Activity (PA)** entries.
- **Sub Project:** Filter by subproject, if applicable.
- **Activities:** Filter by activity type listed in PA entries.

Technical Assistance (TA) Filter:

- **Fulfillment Methods Used:** Filter by how **Technical Assistance** was provided (for example, email, phone, or in-person).



Training Filters:

- **Content Area Group:** Filter by the training content group.
- **Content Area Item:** Filter by specific training content items.

Organize a Combined Reports Search

After running a search, results display in expandable sections. Each section header shows totals based on your selected filters. Sections can be grouped to display subtotals or counts by category, funding source, or other fields.

Available sections include:

- **Technical Assurances Total:** Lists all individual TA entries that meet your search criteria.
- **Project Activities Total:** Lists all individual PA entries that meet your search criteria.
- **Training Events (Total Sessions: #, Total Participants #):** Includes all training events that meet your search criteria, with attendance totals and other specified info.
- **Other Staff Activities:** Includes totals of time entered in categories outside PA, TA, and Training, such as leave time entered directly on timesheets.
- **Project Summary Total:** Displays all Project Activity entries, separated by Project. Each item is hyperlinked by PA Report ID and links directly to the original entry in the PA module. If multiple projects are included in a single PA entry, the entry appears in a separate row for each project.
- **Training: Content Area Summary Total:** Displays all Training event entries, separated by Content Area. Each entry is hyperlinked by Training Event ID and links directly to the event in the Training module. If multiple Content Areas are assigned to a single training, the entry appears in a separate row for each Content Area.
 - This grid can be grouped to view totals by Content Area Group or Content Area Item.
- **TA: Fulfillment Method Summary Total:** Displays all Technical Assistance entries, separated by Fulfillment Method. If multiple fulfillment methods are included in a single TA entry, the entry appears in a separate row for each method. Each item is hyperlinked by TA Report ID and links directly to the entry in the TA module.
- **Total Counts:** Displays the total number of entries by module.
- **Publication Summary Total:** Shows the total number of publications distributed through TA, PA, and Training.
- **Staff Hour Summary:** Displays total billed hours for each staff member, grouped by Funding Source.
 - **⚠ Note:** Results include all entered hours, regardless of timesheet approval status. Totals may differ from Time Sheet reports if entries were edited after submission or approval.
- **Occupation Summary Total:** Lists aggregated totals for all entries by occupation listed in the entry.

Payment Log

The Payment Log tracks all payments collected or recorded in Coalition Manager, including online and offline transactions. Payments can be tracked for the following purposes:

- **Membership dues or renewal fees**
- **Training registration fees**
- **Donations**

Use the Payment Log to view, filter, and export payment activity, or to run reports summarizing



payment details.

Invoice Numbers: Each paid training or eLearning registration generates an invoice with a unique invoice number. Once processed, the invoice number appears in the Payment Log and can be displayed as a column in the Payment Log for quick reference.

Search Options

Use the filters below to narrow results and display specific payment data.

- **Report Duration:** Select the appropriate date range for the report.
 - If **Time Period** is selected, enter start and end dates.
 - If no date range is entered, the report includes all dates.
- **Date Search Type:** For online payments, the transaction date and date received will be the same.
 - **Transaction Date**
 - **Date Received**
- **Payment Mode:**
 - **Online Payment:** Payments made via credit card or bank transfer.
 - **Offline Payment:** Payments entered manually (e.g., cash or check).
 - **Both:** Displays all payments regardless of payment method.
- **Payment Reason:**
 - **Training Registration**
 - **Membership Renewal**
 - **Donation**
- **Payment Status:**
 - **Successful Transactions:** Payments successfully processed through CM.
 - **Error Transactions:** Payments that were not successfully processed through CM.
 - **Both:** Displays all transactions.
- **Name:** Search by part or all of the payer's name.
- **Email:** Search by part or all of the payer's email address.
- **Transaction ID:** Search by all or part of a transaction ID.
- **Notes:** Search payment notes for keywords.
-  **Accounting Code:** Search by General Ledger or Accounting Code.
- **Invoice Number**

Organize Payment Log Search Results

After setting your search criteria, click **Filter** to generate results.

You can review and organize results in the following ways:

- **Edit Notes:** Click the Edit icon in the grid to update payment notes.
 -  **Note:** If notes are edited, include a brief comment indicating an update was made. Payment amounts cannot be edited. Contact CM Support if a payment amount needs to be changed.
- **Export Results:** Click the **Excel** or **PDF** buttons at the top left of the grid to download your report.



MailJet and Transactional Emails

Mailjet is a web-based Email Marketing System (EMS) connected to Coalition Manager to send automated transactional and custom emails. These emails support key system workflows, including membership renewals, timesheet approvals, e-learning access links, registration confirmations, password resets, and other system notifications.

⚠ Note: Coalition Manager does **not** own or directly manage Mailjet. Mailjet is included as part of the CM package solely to support system email delivery.

MailJet Support & Troubleshooting

- For documentation, account-level settings, and troubleshooting, refer to Mailjet Support Resources: <https://www.mailjet.com/support/>
- If you experience an email issue, contact Coalition Manager Support. The CM Support Team works directly with Mailjet and can coordinate faster investigation into delivery or service-level issues on your behalf.

Login Access: When your CM site is launched, or when new staff need access, CM Support will invite designated staff to Mailjet. Contact the Coalition Manager Support Team to request access for additional users.

- **⚠ Note:** Do not create a new Mailjet account independently. All accounts must be linked to your existing Mailjet profile through CM Support.

Navigating MailJet

Stats Page: The Stats page provides detailed delivery data over time. You can:

- Filter by email status
- View open and click analytics
- Export recipient lists with statistics
- Open individual campaigns to view performance details
- Click this page to access your Stats page: <https://app.mailjet.com/stats>

Understanding MailJet Email Statuses and Metrics

MailJet provides delivery and engagement statuses that help you confirm whether emails were sent, delivered, opened, clicked, or blocked. These statuses appear on the Stats and Campaigns pages and apply to both transactional and marketing emails. Understanding these metrics helps verify delivery, troubleshoot issues, and interpret engagement results.

Core Email Statuses:

- **Delivered:** The email was successfully accepted by the recipient's mail server.
 - **⚠ Note:** Delivered does not guarantee the email appeared in the inbox; it may have gone to spam.
- **Opened:** The recipient's email client loaded the email content. This is tracked using an invisible image.
 - **⚠ Note:** Opens are an estimate and may be undercounted if images are blocked.
- **Clicked:** The recipient clicked at least one link in the email. This is the most reliable engagement metric and is tracked regardless of how the email is viewed.
- **Unsubscribed:** The recipient clicked the unsubscribe link in a marketing email. Required for all marketing campaigns.
- **Reported as Spam:** The recipient marked the email as spam using their email provider's tools.



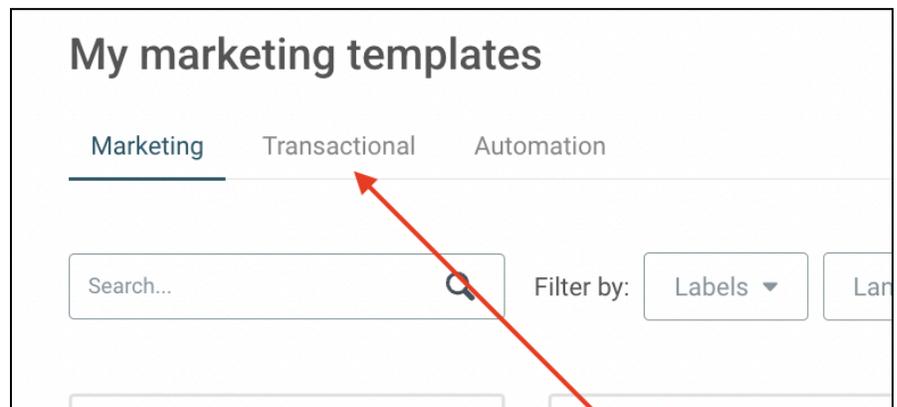
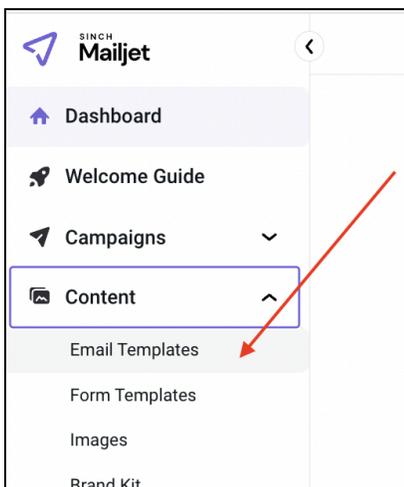
- **Note:** Spam complaints negatively affect deliverability and account reputation.
- **Bounced:** The email could not be delivered.
 - **Soft Bounce:** Temporary issue (for example, full inbox or timeout). MailJet may continue retrying. Out-of-office auto-replies count toward the soft bounce rate.
 - **Hard Bounce:** Permanent delivery issue (invalid or non-existent email). Hard-bounced addresses are automatically blocked by MailJet.
- **Blocked / Pre-Blocked:** MailJet prevented the email from sending to protect sender reputation.
 - Common reasons include prior spam complaints, hard bounces, or spam-like content.
- **Retrying:** MailJet is attempting delivery and waiting for a response from the recipient's server (up to 24 hours).
- **Queued:** MailJet accepted the email and placed it in line to send.

Learn More Here: MailJet Email Status Definitions

<https://documentation.mailjet.com/hc/en-us/articles/360048398994-Email-statuses-all-metrics-explained>

View and Customize Transactional Templates

- **Transactional Templates:** When your site is set up, transactional email templates are copied from CM master templates. Each template is coded to automatically populate user- and event-specific information based on the email's purpose. The language shown is the default template text.
 - To view or edit templates:
 - Go to **Content > Email Templates > Transactional**
 - Search for the specific template by name



Additional Details:

Sender: All automatic transactional emails are sent from info@cmemails.YOURDOMAIN. Replies route to the email address set in **System Configuration > Specific Info > Default Email Address**.

Social Media Links: Social media icons appear at the bottom of transactional emails and link to the URLs entered in System Configuration > Specific Info > Social Media Links. Only icons with active links display.

Logo: The logo uploaded in **System Configuration > Specific Info > Organization Logo** appears in



the email header. Logo size and shape affect how it displays.

Confirm Email Delivery: All transactional email activity sent through MailJet can be reviewed to confirm delivery status.

- **⚠ Note:** Custom training emails created in Event Details are also sent through your site's MailJet account.

Enabling Emails: When a site is first deployed, all automatic emails are disabled. CM Support works with you during post-deployment setup to determine which emails to enable.

Automatic Mailing Lists: Each site includes three default mailing lists. Email addresses are automatically added to the appropriate list unless **Add to Mailing List** is unchecked. Log into MailJet to view contacts in these lists:

- CM Attendees
- CM Donors
- All CM Contacts



Email Marketing System (EMS) Integration

Your Coalition Manager (CM) system is connected to an Email Marketing System (EMS) to manage emailing lists and send newsletters, event announcements, and other bulk communications.

During deployment, CM Support confirms whether your organization will keep an existing EMS or switch to MailJet (included at no additional cost).

MailJet Option: MailJet is the default EMS for all CM systems. Use MailJet for marketing campaigns if your organization does not maintain a separate EMS or chooses to switch.

Custom EMS Options: If your organization already uses another EMS (for example: Constant Contact or Mailchimp), CM can integrate with that platform instead of MailJet.

Automatic Mailing Lists: Each CM system includes three mailing lists that sync automatically with your EMS:

- **CM Attendees:** All training registrants
- **Donors:** All donors with an email address (*does not include prospective donors*)
- **All CM Contacts:** All contact email addresses in CM

Custom Mailing Lists: CM-integrated mailing lists are created and managed in Coalition Manager in System Configuration > Mailing Lists. Any changes sync automatically to your EMS.

How to Manage Mailing Lists

- **Contact Type-Specific Lists:** Automatically add contacts and/or contact staff based on Contact Type.
- **Default Mailing Lists:** Automatically add all contacts, contact staff, and Coalition Staff.
- **Bulk Import Add:** Use a CM template to add imported contacts to selected lists.
- **Individual Add/Remove Contacts:** Edit a Contact or Contact Staff profile to manage list membership.

How Contact Emails Sync and Update: All mailing list updates must be made in Coalition Manager. CM pushes changes to your EMS; the EMS does not push data back to CM.

- **New Contact Added:** Added to the All CM Contacts list and any other added mailings lists.
- **Email Updated in Contact:** Updated automatically in the EMS.
- **Contact Expires:** Removed from EMS lists after a 90-day grace period.
- **Email Archived:** Removed from all EMS lists.

⚠ Note: Changes made directly in your EMS or MailJet do not sync back to Coalition Manager and may cause errors. For example, renaming a mailing list in the EMS breaks the connection and prevents new contacts from being added. Always make mailing list changes in CM.



Mailjet Tips for Coalition Manager

Use the tips below to help ensure Coalition Manager emails reach inboxes and are not blocked by your user's spam filters.

Add CM Email as a Contact

Add a new contact in your email system (i.e. Outlook or iMail) using a CM email address (for example: info@cmemails.YOURDOMAIN.org).

Some email providers also allow you to mark domains as safe. If available, mark the @cmemails.YOURDOMAIN.org domain as trusted to improve delivery.

Check Spam, Junk, and Quarantine Settings

- Check your "Junk" and "Spam" folders for any CM emails. Mark them as "Not Junk" or "Not Spam" from those folders. Gmail Email Outlook Email
 - [Gmail Email](#)
 - [Outlook Email](#)
- Check quarantine features and mark our emails as safe. Quarantine features are not part of your main email inbox; they can be accessed by logging into your account via a web browser.
 - [Google Workspace](#)
 - [Office365](#)

Update Staff Lists

Contact staff lists should be kept current by adding, editing, or archiving staff as needed. Inactive or outdated email addresses can hard bounce, which negatively impacts email deliverability over time.

Connect with Your IT Department

Organizations with managed email systems (such as hospitals, government agencies, or law enforcement) should coordinate with IT staff to allow CM emails through security filters.

IT teams may need to:

- Allow the domain: @cmemails.YOURDOMAIN.org
- Whitelist the originating IP addresses:
 - 185.211.121.17
 - 185.250.236.54
- Safelist MailJet tracking domains used for open and click tracking:
 - szj4k.mjt.lu
 - r.mailjet.com
 - t.mailjet.com

⚠ Note: MailJet uses servers in Europe (Belgium, Germany, and Luxembourg). Some system emails may originate from these regions and should be allowed by IT filters.





Additional Included Features

The following optional add-ons and features must be enabled by CM staff or developers. Please connect with us about enabling a feature and training around the feature for you and your colleagues. These features are no additional cost for base implementation.

Contact Module

- Join Us link on login page
- Membership payment plans
- Public directory geocoding
- Lock contact fields from member edits
- Custom Public Directory search filters
- Single-select Program Type / Program Service
- Contact associations: Allow contacts to view related contacts' details, trainings, or custom form data

Training Module

- Text message reminders
- Training compliance tracking
- Training prerequisites
- Failure-to-cancel enforcement
- Custom invoice, login-required, and registration confirmation text
- Training Series
- Live E-Learning (Version A or Version B)
- Virtual training integrations: Zoom, GoTo, or Microsoft Teams
- Online training reports
- Lock Occupation fields for non-admin users
- Spanish translation for training registration pages
- Member-only training events
- Non-Coalition trainings

Time Tracker Module

- Timesheet reporting
- Maximum hour limits
- Automatic end-of-period emails: Submit timesheets and approve leave
- Yearly FTE calculations
- PTO accrual and balance tracking
- Remove unused funding sources and activities from time reports

Custom Form Module

- Conditional logic
- Form Approval Process

TA & PA Modules

- Applicable Funding Grant Sources
- Link TA services to Contact Program Type or Program Service

Other

- **Multiple payment options:** Online, Offline, ACH Bank Transfer



Integrating Coalition Manager Into Your Website

Coalition Manager can be integrated into your website using **Public Links** or the **Public API**. Both options allow you to share public information from Coalition Manager, but they serve different purposes and require different levels of technical setup.

Public Links are best for sharing Coalition Manager pages exactly as they appear, offering quick setup and direct user interaction.

The **Public API** is best for displaying Coalition Manager data inside your own website's design and should be used when you need custom layouts, searchable directories, maps, or deeper website integration.

Public Links

Public Links open Coalition Manager-hosted pages that visitors can access without logging in (unless the action requires it). These links are the fastest way to share information publicly.

To find and copy your Public Links, go to System Configuration > Site Specific Info. Once copied, they can be added to your website, emails, or other materials using links or buttons.

Public Links can be used to:

- Add a Member Login button to your website
- Allow visitors to Join your coalition or network online
- Display a Public Directory of member organizations or programs
- Collect donations through a public Donate page
- Share Trainings and Events for viewing and registration
- Display public resources stored in Resource Manager

In addition, individual event promo pages, form submission pages, and resources can be public when accessed while logged out, depending on their Access Level.

Public API

The Coalition Manager Public API allows a web team to pull **public-facing data** from CM and display it directly within your website. Unlike Public Links, the API does not show CM pages. Instead, it sends raw data that your website formats and displays.

The Public API uses **open endpoints**, meaning no login is required to access approved public data. This option requires a web developer to set up and maintain.

What the Coalition Manager Public API Can Do

- **Resources** (public Resource Manager content): These endpoints are commonly used to build a custom **resource library** on a website. The API can retrieve the following:
 - Public resource types and categories
 - Public resource sub-types
 - Resource sub-types grouped by resource type
 - Lists of public resource names (ID and title only)
 - Full public resource details, including:



- Title and description
- File or link information
- Tags and categories
- File type and upload date
- View and download counts
- Resources by type or sub-type
- Resources marked as **accessible** for people with special needs
- Tags used on public resources for filtering or searching
- **Trainings** (public listings): This data is often used to create **searchable event directories**. The API can retrieve the following:
 - Upcoming training events
 - Upcoming online trainings
 - Filter training listings by title
- **Public Directory** (opt-in contacts): This data is often used to create **searchable member organization directories** or **interactive maps**. This API can be used to retrieve:
 - Public directory contact list
 - Filter directory listings by name, city, state, phone number, or zip code

API Access for Website Integration: <https://element74.stoplighlight.io/docs/coalition-manager>

This documentation is intended for web developers or IT staff.

This site contains the full technical documentation for developers, including:

- Available API endpoints
- Required parameters
- How to format requests and use returned data



★ Paid Add-Ons

The following features require a one-time, per-usage, and/or monthly subscription fee, depending on the add-on or module. Contact CM Support for a feature demo, to enable a feature, or to discuss pricing.

Forum

- Foster community and collaboration through the **Forum Module**.
- Create discussion spaces for members, affinity groups, or specialized topics, with customizable access levels for focused conversations.
- 🧑‍🎓 **Video Tutorial:** View how to create and manage discussion threads and group forums. <https://www.loom.com/share/c10e491f020e4d4f890ecec7cfb3b9b3>

SCORM Integration for E-Learnings

- Support interactive, self-paced eLearning with SCORM content integration.
- Upload modules created in Articulate, Adobe Captivate, or other SCORM-design programs.
- CM Support assists with setup and testing to ensure seamless tracking and completion records within your site.
- 🧑‍🎓 **Video Tutorial:** Learn how to upload and configure SCORM-based eLearnings in your CM site. <https://www.loom.com/share/a38c8a8e7a134b40af67f02ff71a0db>

Customized Headers for Public Pages

- Maintain consistent branding across your public pages, i.e. Join Us, Public Directory, Donate Now, etc.
- Custom headers allow your coalition or network to match the colors, logos, and layout of your main website for a cohesive look.
- 🧑‍🎓 **Video Tutorial:** See how to apply and preview custom headers across your public pages. <https://www.loom.com/share/798ca9c49c73467cb3fddbb8f820eb52>

Merit Nonprofit Professional Development

- Integrate nonprofit e-learning paths directly into your Coalition Manager site using the Merit Module.
- Users can complete self-guided professional development courses, track progress, and record completions in the Training Module.
- **Learn More:** <https://e74.coalitionmanager.org/resourcemanager/resourcefile/details/74>

Listserv

- Enable streamlined group communication through a single shared email address.
- When one member emails the Listserv address, the message automatically distributes to all subscribers.
- Your staff can:
 - Create and name Listservs.
 - Add or remove members.
 - Use them to coordinate updates, share resources, or host discussions.
- 🧑‍🎓 **Video Tutorial:** Learn how to create and manage Listservs in your CM site. <https://www.loom.com/share/d13726d6190c498b82a7aa9f4a89048c>

Two Way Texting

- Send text messages directly from your CM site to contacts who have opted in.
- Texting is available from filtered grids in Contact Directory, Access Groups/Committees, Donor Search, and Registration grids.



-  **Video Tutorial:** View how to send texts to filtered contact lists in Coalition Manager. <https://www.loom.com/share/ce31ffe7a76b4a548063ce1974328d7c>

Legal Services Module

- Connect clients with pro bono attorneys and streamline legal intake and scheduling within Coalition Manager.
- Legal advocates can complete survivor intakes, match needs with attorney expertise, and schedule Zoom meetings.
- Automated notifications update advocates, attorneys, and survivors throughout the process.
-  **Video Tutorial:** Learn how to manage survivor intakes and schedule attorney meetings. <https://www.loom.com/share/4972ae5e2a1c4918b0d172ca219aa1ef>

Facilitator Check-In

- Allow approved external facilitators to manage trainings without full staff-level access.
- Facilitators can:
 - Create and manage training events.
 - Handle registrations, attendance, surveys, and CEUs.
 - Host virtual or in-person sessions.
 -  **Video Tutorial:** Learn how facilitators can create and manage trainings within your site. <https://www.loom.com/share/ef799f28a52d4a84b4057925afa2c2ec>

Lending Library

- Simplify the process of loaning and borrowing physical resources (i.e. curricula, activities, technology) with the Lending Library Module. Get notifications for holds, checkouts, and returns.
-  **Video Tutorial:** Learn how to create a list of materials to put out on loan, and how users submit requests to borrow the material. <https://www.loom.com/share/72ab7f39f83e472081be44b6dea0ae70>

