COALITION MANAGER

Video Library

Click on any of the links below to view video tutorials of CM features.
Updated November 2024

General Guidelines:

Data Grid Tips

- Grouping and Counting in CM Grids

System Configuration Options

- How to Create Announcements
- How to Create FAQs
- Adding Non-Coalition Trainers

Contact Manager Module:

Run a Contact Directory search to find filtered info about Contacts and Contact Organization's staff

- Export emails from Contact Directory results to an Email Marketing Mailing List
- Export contacts from Contact Directory results to an Access Group
- Direct email a list of addresses from Contact Directory results

Add a new Contact Organization or Contact

- Add staff to a Contact Org or Member Program
  - Add multiple staff at a time
- Add multiple contacts at a time (CM Admins only)
- Add Contact address(es)
- Add Contact phone number(s)
- Add files to a Contact's Details
  - Required Document Type
- Add Social Media Info to a Contact's Details
- Add a logo to a Contact's Directory Listing
- Contact's Additional Information
- View historical data from Additional Info Section
- Create Custom Contact Sections and Questions (CM Admins Only)
  - Add images to Contact Details and Public Directory

Enter that a check was received for membership renewal payment.

Contacts List: View, edit, or delete Contacts and their Contact info

Associate Contacts - allow a Contact to see records of another Contact not in their staff list

- Associated Training Records

- Associated Contact Details
- Associated Custom Forms

Manage Coalition/Network Staff
- Export staff emails as a group
- Add, Edit, remove allocated funding sources for staff (CM Admins Only)
- Add Paid Time Off accrual rates and balances for staff (CM Admins Only)

Manage Requests from the Join Us Page
- View Pending Contact Requests
- View Denied Contact Requests
- View Pending requests from staff at Contact Organizations

User's Grid - Locate info and edit access for all CM users including password reset, login unlock, and (CM Admins only) edit to Coalition Staff/Admin levels

Access Groups: Create special permission groups to share protected forms, trainings, and resources.

Contact Manager Videos from a User's Perspective

- View and print Membership and Training invoices
- Pay annual dues via Credit Card
- Make a payment via ACH Bank Transfer
- Pay annual dues by check
- Perform yearly "verification" without membership fee
- View historical data on payment and renewal information

Custom Forms Module:

Create a new form
- Design a form
  - Create Form sections
    - Create page break or an instruction block
  - Create questions
    - Creating multiple choice questions
    - Creating grid questions that can add, subtract, and multiply across rows
  - Create questions with conditional logic (the form changes depending on a respondent's answers)

Create a form that will prevent a person or an organization from submitting more than once:
- Form Edit Request
- For form respondents who are users and log into the System - set the Form Frequency as One Time and set the appropriate Form Access Level.
- For form respondents who are NOT users but you either have or want to have their Info in Contact Manager - use Unique Submissions. Set the Form Frequency as One Time and set the Access Level as an Access Group or Contact Type
- For form respondents who are NOT users and you do not have nor want to have their info in Contact Manager - Set the Form Frequency as Unlimited, set the Access Level as Link only or Open to All, and create a question that uses Unique Response setting.

Manage Forms that have been created:

- View, edit, and copy the link for forms that have been created and are published, not published, and archived
- Send an email to a form respondent when they submit the form
- Send an email to access group to notify that the form is open/about to open
- Send an email to access group to notify that the form is about to close
- Run reports to get data from a custom form
- Graphical reports

Project Activity Module:

- Create a new PA
    - Create pending PA with email notification to staff
- View, edit, or remove PA created within the past 6 months
- Project Activity Report Search

Technical Assistance Module:

- Create a new TA
    - Use quick search fields to enter TA recipient
    - Create pending TA with email notification to staff
- View, edit, or remove TA created within the past 6 months
- Technical Assistance Report Search

*Note that billed time entered into PA, TA or Training will not update the Time Report if it has already been submitted.

Time Tracker Module:

- View, edit, and enter information on a timesheet (This is where you can request, edit, or delete time off and view grant percentages used for activities in the month.)
    - View PTO balances
    - Set up PTO balances for staff (CM Admins only)
    - Error message when trying to view/edit timesheet
- Submit and/or view Time Activity Report
- View, edit, approve, or reject requests for time off (CM Admins and Supervisors only)
- See which staff have or have not yet submitted timesheets (CM Admins and Supervisors only)
- Create to-do lists for Coalition/Network staff
- Run reports on time worked, time off, and PTO balances for Coalition/Network staff
- Updating Billed Information when Timesheet has been submitted

Training/Events Module:

- Create a new Single Training Event
- Create a new Training Series (or duplicate a previous series to copy all settings into a new one)
    - Create fee-based trainings

  - Create an event that requires or satisfies a prerequisite training
  - Make a virtual-integrated event
  - Create a Custom Certificate of Completion for a Training/Event
  - Require registration approval
  - Create customized emails to training registrants prior to the event:
    - Registration Confirmation Email Options
    - Event Reminder Emails
    - Follow-up emails
  - Create/manage a waitlist
  - Create a group or custom discount
  - Create Custom Registration Questions for a single event
  - Create Custom Registration Questions for multiple events (CM Admins only)
    - Reorder registration questions

Manage the Training After the Event

- Import registrations in bulk
- Send a quick email to all registrants using your own email (in Outlook, Gmail, etc.)
- Event follow-up email options
- Sync check-in and generate an attendee report for Zoom-integrated events
- Manage Failure to Cancel list - penalizing no-shows

Find and edit current events (Also go here to find the links to the registration grid, to create new registration questions, to enter occupation counts for events with no registration, and to run evaluation reports)

- Find and edit current series of events

Cancel an event and send out notification emails of cancelation

Manage E-Learning Courses

- Create an Online Training Course or Live Online Hybrid Course
  - Info about SCORM courses (Increased monthly fee)
  - Info about Live Online courses
  - Info about Prepackaged Merit Professional Development Courses (increased monthly fee)
- Enter the Basic Course Info
  - Create custom emails for course registrants (mostly used in Live Online)
  - Assign an E-learning Category
  - Add Course Lessons and Resources
  - Add Quizzes and Evaluations
    - Create quizzes that are graded

Find and edit active and inactive online trainings

Training Event Attendee Grid - Find information on any training attendee

Non-Coalition Trainings - Enter professional development information for trainings attended at outside organizations

Members Training Events - Allow users to advertise their own upcoming events on CM dashboards

Run Training Data Reports

- Event Data Summary - info about number of attendees, training topics, disciplines, trained, and publication distribution
- Registration/Attendance - info about Training Attendees
- Run Reports on data entered in Non-Coalition Section -for trainings attended outside of your organization

Training Module Videos from a User's Perspective

- Training Module viewpoint when logged in as a user. Access Training records, pay training fees, download certificates of completion, and register for new events when logged in
- Registering for an Event and the Data is autofilling incorrectly or incompletely, update the Training Profile
- Users find Training records of associated contacts
- Cancel a registration via the link in email confirmation

Donor Management Module:

- Add custom questions to Donation Page and Donor Profile (CM Admins)
- Add a new donation via credit card
- Add a new donation through ACH bank transfer
    - Donations in "honor/memory of"
    - Donation notifications to a 3rd party
    - Allow donors to pay optional transaction fee
- Customize suggested donation amounts (reach out to CM Support)
- Bulk import information about donations or donors
- Search donations or donor information

Donor Grid - Find and manage information about Donors

- Manage information about prospective donors
- Email a group of donors or prospective donors via your email application
- Add donors to your email marketing lists
- Connect donors to contacts in Contact Manager
- Add interactions to keep track of touch points with donors/prospective donors

Donations Grid - Track donor information, add donations received via cash or check, enter interactions with donors

Resource Manager Module:

- Upload a new document or hyperlink into CM
    - Upload a group of resources

Search Resources

- Resource Search - user friendly view to search resources (this link can be shared publicly for public resource library)

- Resource Summary - Aggregated data on access info

Current Resources - All active and archived resources

Run Data Reports

- Save report search criteria for quick searches
- Organize and save data in grids for easier access later
- Export custom form data in graphical form (pie charts)
- Combined Reports - Find data from all modules in CM
- Payment Log - Find data on any payment made through CM