COALITION MANAGER

SYSTEM CONFIGURATION

Introduction

This manual outlines System Configuration, the hub for customizing your Coalition Manager site. Here are a few guidelines to keep in mind as you move through the handbook:

- **Access Levels:** Certain sections in System Configuration are visible and accessible to different users based on their access levels.. Each section in the manual outlines the access for different user levels.
  - Access levels for your staff can be updated in Contact Manager > Users List, then clicking the Reset Role Icon.
  - **SuperAdmin**: Only Coalition Manager Staff can have this level and it is used to customize system-wide changes.
  - **CoalitionAdmin:** Highest level for your Staff. Admins are able to edit and customize various options for the entire system and within specific modules.
  - **CoalitionStaff:** Default role of your Staff (email addresses entered in Contact Manager > Staff will automatically be given this access). Access is very limited in what they can access in System Configuration but the vast majority of CM work can be done at this level.
  - **Users** (i.e. Staff at Member Organizations): No System Configuration access, no access to data entry modules or modules to create trainings, forms, or resources.

- **Manual Headers and Titles:** Headers and titles in this manual are color coordinated to represent different groupings.

LIGHT BLUE	Larger sections in the System Configuration Dashboard, typically an entire module
ORANGE	Specific types of labels that can be customized
PURPLE	How-Tos and Videos showing specific directions
GREEN	Pro Tips on customizing Coalition Manager
DARK BLUE	Notes and reminders on features and sections.

Don't worry, this handbook doesn't take the place of 1-1 support! If you do not find the answer to your question, please reach out to The CM Support Team. We are happy to help troubleshoot with you.

-Your Coalition Manager Support Team
support@coalitionmanager.org
800-350-9973

(Handbook updated: March 2024)

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General System Configuration

Larger changes that impact all of your site are changed in General System Configuration.

All staff at your organization can use System Configuration to access and edit dashboard announcements, create FAQs for your users' Help section, and add/edit Non-staff Trainers. In addition, staff who have been given Admin access are able to edit various menu options, reorder groupings, and change other format setting options in each module.

NOTE *Any changes to these settings could be global in nature and affect the entire Coalition Manager platform. Please proceed with caution.*

Task	Access		
	Super Admin	**Coalition Admin**	**Coalition Staff**
Create Announcements	☑	☑	☑
Create FAQs	☑	☑	☑
Add/Edit Non-staff Trainers *NOTE: This is located under Trainings/Events for Super Admin and Coalition Admin and under General System Configuration for Coalition Staff*	☑	☑	☑
Your Organization Specific Info: • Primary Contact Info • Create Default Certificate • Organization Logo • Default Event Promo Image • Social Media Links • Designate default notification emails	☑	☑	
Access Public Links	☑	☑	
Edit the descriptive text at the top of the public pages	☑		

Announcements

Announcements are messages displayed on users' dashboards. This is a useful place to share due dates, exciting happenings at your organization, staff changes, policy alerts, or to draw attention to any System changes you would like to highlight.

Announcements can be made visible to select audiences based on the access level that you give it. Rearrange the order of announcements on the dashboard by dragging the item up or down in the Announcements grid.

- **Title:** Titles will appear in bold on the dashboard.
- **Announcement:** Create the text of your announcement and format it by using the available tools. You can embed videos and gifs, add hyperlinks, etc.
- **Any Link?:** Select this box if you would like to display a clickable button below the announcement, which will link to a webpage.
  - Link Text: Enter the text you wish to see on the button (i.e. "Complete Survey" or "Click Here").
  - Link: Paste the web link. Be sure to include the entire address including http:// when applicable.
- **Is Visible?:** Select this box if you are ready to display your announcement publicly. If unchecked, the announcement is in draft form until it is ready to be published.
- **Access:** To make the announcement visible to only select audiences, choose from the dropdown list which Contact Type(s) should see the announcement. Select All if the announcement is open to all users logging into your System.
- **Announcement Start and End Date:** Select the date and time the announcement will be automatically published and unpublished.

Your Site Specific Info

Your organization's contact information and other default system settings are managed in this section. The settings here include name formatting preferences, organizational logo and default event image, default training certificate, default email notifications, and other information.

Click "Edit Info" at the top or bottom of the Site Specific Info page to update any of the following sections:

Your Site Information:
- **Organization Code:** Your organization's acronym, which will show on the Staff List.
- **Organization Name:** Your organization's name, which is displayed throughout your CM site.
  - **Name Format:** Select how contact names will be displayed throughout your system. Options include:
  - **Use Name Prefix?** Check this box if you would like contacts to have a field option to enter a prefix (i.e. Ms., Dr., Esq., etc.).
  - **Use Pronouns?** Check this box if you would like contacts to have a field option to enter their pronoun (i.e. He, They, She).
  - **Phone Format:** Select how Contact phone numbers will be displayed. Options include:

- ○ **Date Format:** Select how date fields will be displayed across your system. Options include:
  - ■ Short Date Time String (i.e.: 6/15/2020 1:45 PM) This option is recommended.
  - ■ Short Date String (i.e: 6/15/2020)
  - ■ Long Date Time String (i.e.: Monday, June 15, 2020 1:45:30 PM)
  - ■ Long Date String (i.e.: Monday, June 15, 2020)
- ○ **Zip Format:** Select how Contact zip code will be displayed in CM. Options include:
  - ■ Zip Code Five Digit Only
  - ■ Full Zip Code (i.e. 29205-0440)
- ○ **Primary Phone Number and Extension:** Enter your organization's primary contact number. This information will be displayed on the invoices that contacts and training registrants can download for training and membership dues payments. This information will also show on the bottom of all public pages.
- ○ **Primary Email Address:** Enter your organization's preferred email address. This information will be displayed on your system's invoices. This address also will be used by default to receive email notifications if no email is listed in Email Notifications (see the Email Notifications for specific details).

Your Site Images:

- ● **Organization Logo:** This image appears:
  - ○ In the middle of your log-in screen.
  - ○ On the upper left-hand side when logged into your System.
  - ○ On public pages on the upper left-hand side.
  - ○ Displays at the top of transactional emails sent through MailJet.
    - ■ File Type must be PNG.
- ● **Event Promo Image:** This is the default image that appears on the Promo Page of any training/event if a custom image is not used.
  - ○ File Type must be JPG.
- ● **Members Event Promo Image:** This is the default image that appears on Members Training Event pages if the member/user does not otherwise upload their own image. Since these events are not hosted by your organization, it is recommended that something other than your org logo is used.
  - ○ File Type must be JPG.
- ● **Training Certificate:** The default training certificate is used for any training/event where the "Default Certificate" is selected. Upload the file and then design how the data will auto-fill and be displayed.
  - ○ File Type must be JPG. The page layout for the certificate can be either landscape or portrait.
  - ○ **Available Certificate Fields:** Select the field(s) to make available when designing training certificates. These are the fields that will show up when designing your Default Training Certificate or Custom Certificates within an individual event.
    - ■ EventName
    - ■ StartDate
    - ■ EndDate
    - ■ EventDays
    - ■ EventTime
    - ■ EventType
    - ■ EventAddress
    - ■ NonCoalitionTrainer
    - ■ CertificateImage
    - ■ ParticipantName
    - ■ DateCompleted
    - ■ Hours
    - ■ CeuInfo
    - ■ CertificationId
    - ■ StaffTrainer

CREATE TRAINING CERTIFICATE

- Click "Add Field" to design which fields will be auto filled on the certificate and how the fields will be displayed. Select each field one-by-one and drag them to the proper location on your certificate. These fields will automatically populate on the certificate. (If no fields are showing in the dropdown box, go back to the Coalition/Network Specific Information page and add them to the Available Certificate Fields box.)
- When finished, click Save Layout.
- Click Close to return to the "Edit Info"page.

Primary Contact Person
- This information is for Coalition Manager staff to know who to contact at your Organization, if needed. This is also the name that will autofill when you preview a Training Certificate.

Primary Address
- This information will be displayed on the invoices that are downloaded for training fees and membership dues. The address will also show at the bottom of your System's public pages.

Coalition/Network Social Media Links
- Enter any links to social media accounts for your organization. The hyperlinks entered here will automatically populate as hyperlinked icons (i.e. an "f" for Facebook, etc.) in the footers of transactional emails that are sent out of the email marketing platform. These links also populate in the same way on your System's public pages. If a field is left blank, nothing will be displayed for that link on the transactional email nor on the public web page.

Email Notifications
Email notifications are sent automatically whenever a certain action is performed in your System. Multiple email addresses can be listed to receive notifications; simply separate each email address by a comma.
- **Enable Contact Profile Update Email?:** Check this box if you would like an email notification to be sent to the email address entered in the Contact Management field (below) whenever any update is made by a user or contact organization's admin to sections of their contact details.
- **Contact Management**: Email address(es) entered here will receive email notifications for the following:
  - Submission of a request to join via the Join Us page
  - Payment of membership dues
  - Yearly Contact renewal is submitted
  - When a Contact indicates they will pay membership fees by check
- **Training Accommodations:** Email address(es) entered here will receive a notification when a training accommodation has been requested. Email addresses for this purpose may also be added to each individual training.
- **Members Training Events Notifications:** Email address(es) entered here will receive a notification when a member submits a request to advertise a training event.

- **Time Sheet Management:** Email address(es) entered here will receive a notification when a submitted timesheet has received first approval by the designated supervisor. This is a prompt to give final timesheet approval.
- **Donation Emails:** Email address(es) entered here will receive a notification when someone makes a donation through your System's Online Donation function.
- **Training Compliance:** If the Training Compliance feature is turned on for your System, the email address(es) entered here will receive a notification when training compliance requirements are not met by a User. (Note: Contact Coalition Manager support staff for information on the Training Compliance feature and to request it turned on.)
- **Lending Library Emails:** If Lending Library is enabled on your CM site, the email address(es) listed here will receive notifications when a resource is requested to be checked out. (Note: Contact Coalition Manager support staff for information on the Lending Library feature and to request it turned on.)

Other Configurations

The following are optional features or sections that can be turned on and off by Coalition Manager Support Staff. This information is not visible to your Admins; therefore, if you need more information about whether these are enabled for your site, or to make a change to any of these settings, please contact CM Support.

- **Allow Payment Plan:** Contact Organizations who pay membership fees can pay with a payment plan, such as monthly or quarterly. Payment plans are configured by each Contact Type in System Configuration.
  - Contact Additional Information: When a payment plan is selected, contact additional information displays the following:
    - Payment Plan Option: Time period of payments
    - Plan Amount : Amount of each payment
    - Plan Amount Due: A running calculation of the balance due
    - Plan Due Date: When the next payment is due
- **Use Reporting Region:** Allow your CM site to sort data by customizable regions.
- **Enable Email:** The transactional emails sent from your Coalition Manager system (i.e. Training Confirmations, reminders or follow up messages, etc.) may be turned off or on, if needed. When you first deploy your System, emails are usually turned off so that tests can be run without sending emails.
- **Enable MailJet Email:** The transactional emails sent through MailJet may be turned off when you first deploy your CM system so that tests can be run without sending emails to real people.
- **Enable Text Messages:** Text message reminders can be sent automatically to registrants for upcoming trainings. These text messages will only go out to registrants who have added their phone numbers to their account profiles and who have elected to receive text reminders. Texts will also only be sent if a reminder email has been enabled for the training. Texts simply notify the participant that an event is coming up in the next few days.
- **Test Payment Mode**: If Stripe is the payment processing application connected with your CM system, you can test payments when the test payment mode is turned on. When test payment mode is turned on, you can use Stripe's **test card numbers.**
- **Enable Training Compliance:** When this feature is enabled, your staff and the admins at member organizations can track whether their staff members have completed requisite yearly training. When someone has not met the training compliance requirements, they will be sent an email reminder, as will their organization admin. Training Compliance settings are further enabled in System Configuration > Training > Training Compliance. Reach out to CM support for more details.

- **Enable Training Pre-Req:** When Training Prerequisites are turned on, Trainings and ELearning Courses can be set up so that registrants must first have completed one or more required trainings. Reach out to CM support for more details.
- **Enable Join Us:** The Public Join us page can be turned off if it will not be used. Read more about this feature in the Public Links section above.
- **Enable Member Affiliation:** Checking this box adds a question to the public Join Us page that allows people to join as staff of a Contact that is already in the system.
- **Disable Non-Coalition Training:** Checking this box removes the Non-Coalition Trainings section from the Trainings/Events Module.
- **Secure Public Directory:** The Public Directory (a searchable list of certain member/contact organizations) can be made "secure" by limiting visibility only to users when they are logged into Coalition Manager. (Note: if Secure Public Directory is used, you must also select the option to Enable Public Directory When Logged In.)
- **Enable Public Directory When Logged In:** When this is selected, a link to the Directory will be visible at the bottom of the Module list on the left hand side of the screen when logged in.
- **Disable Time Selection:** Select this box to remove the clock and time specifics for billing and timesheets. This selection means that billed time is only tracked in hours and minutes and not specific times (i.e. 2 hours instead of 9:00-11:00.)
- **Disable Failure to Cancel:** When the Failure to Cancel feature is enabled, training registrants experience a penalty if they no-show for an event. When a training registrant does not properly cancel their training registration, they will be unable to register for future trainings in your system until the Coalition resolves the block. For staff within a contact organization, the whole organization is blocked from logging in until the block is resolved. Reach out to the CM Support Team for more details.
- **Pay Period Type:** The following are the Pay Period options that will impact the way that time reports are submitted in the Time Tracker Module:
  - Weekly
  - BiWeekly (every 2 weeks)
  - Monthly
  - Fixed (specific date each month, i.e. the first of the month)
  - BiWeekly Fixed (specific date every 2 weeks, i.e. the first and last friday of the month)
- **First Work Date/Period:** Enter in the first work date and last work date of the pay periods if your pay period is fixed. Otherwise, enter the first day of your pay period. The system will then automate the subsequent pay periods based on your entry.
  - Format: m/d/yyyy-m/d/yyyy (if using Fixed) else m/d/yyyy
- **Time Report YTD FTE Start Date and End Date:** Your organization can track yearly percentages of time billed toward one or more funding sources, in addition to the system detaulf (which is monthly percentages). To set this up, enter the current fiscal year dates into these fields in System Configuration. When dates are entered in these fields, CM will automatically begin calculating yearly percentages based on the allocations that are set up in the staff profiles. CM will also automatically roll over each year to the new fiscal cycle without needing to update the date in system configuration.
- **Transaction Fee for Contact Membership, for Training and/or for Donation:** Organizations can pass along a payment transaction fee to the payee whenever membership fees, training registration fees, and/or donations are paid through a credit card. If left at 0, no transaction fee will be charged. For donation transaction fee, donors will be given the choice to pay or not pay the fee.
- **Default Billing Hour Increase:** Throughout your System, when entering billed time in PA, TA, or training, the hours will automatically round up according to the rate listed here. i.e. If the Default Hour Increase is .25 (or 15 minutes), entering 1.20 hours will round up to 1.25.

- **Default Sender Email:** The email address entered here will be the address where responses are rerouted if someone replies to a transactional email. Since your system sends approximately 50+ types of emails with a variety of purposes, it is recommended to use a generalized email address, if possible.
- **Test Email Addresses:** When system-wide emails are turned off, email addresses can be listed here for testing purposes and they will receive notifications while testing.
- **Occupation Label:** The word "Occupation" is used throughout the system to help capture a data point for some grant funders. However, that label can be changed to something that might be better suited to different organizations or funding requirements (i.e. "Discipline" instead of "Occupation").
- **Coalition Display Name:** Text listed here appears in two places, if no text is listed in this field, "Coalition Manager" appears by default.
    - Login page: Displays "Welcome to COALITION DISPLAY NAME" when text is added.
    - Logout confirmation page: Displays "Thank you for using COALITION DISPLAY NAME"
- **Conditions:** Conditional Logic allows you to build forms with questions that will respond in a certain way, depending on the answers to other questions, i.e. skip or hide a question.
- **Use SCORM:** This upgrade allows you to upload SCORM-compliant files to ELearning Courses, thus turning the Courses into interactive LMS. SCORM files are created in specialized design software, such as Adobe Captivate or Articulate, which must be purchased separately. This feature is a paid-upgrade. Contact CM Support for details and pricing.
- **Hide Occupation from Contact Staffs:** Non-admins at organizational Contacts cannot change their occupations when this box is checked. Only Coalition Staff or admins at organizational Contacts can edit the occupation field.
- **Enable Max Hour Limit:** Limits can be placed on billed time per funding source. This option makes it possible to prevent overspending on staff time.
- **Disable Public Layout for Custom Forms:** Some sites have a special, customized header on their Public Pages. For those with customized headers, these can be removed on just custom form pages.
- **Hide CEU:** For Organizations that do not offer continuing education credits, the CEU field can be hidden from the Training Module.
- **Allow Offline Renewal:** For organizations that require fee-based membership renewal, your System will default to accept only online payments via credit card. However, if your organization would like to allow other payment options such as Pay by Check, this can be easily turned on. (Online payments by ACH Bank Transfer are also available by request to the CM Support Team.)
- **Enable Training Event Series:** Training Events created in the Training Module are defaulted to be single occurrence, meaning that the event is one day or multiple days in a row (i.e. a webinar, workshop or conference). When the Training Event Series is enabled, you can create either one-time events or a series of events. A Training Series is a group of events that span multiple non-consecutive days (i.e. a monthly webinar or quarterly meetings). Each event in a series will have the capacity to track attendance separately for each event.
- **Disable Membership Fee:** For Organizations that do not require membership fees and do not need an annual process to update their Contact information, the renewal/verify and the Offline Payment buttons can be removed from the top of all Contact Details pages.
- **PTO Type:** Use the Time Tracker Module to determine how much paid time off can be requested by staff and your System can track Leave Time accrual and balances. The leave time categories must first be designated as "PTO" in System Configuration > Time Tracking > Time Activities. Then, allocations must be entered for each staff person in their Staff Profile. PTO can be accrued in one of the following ways:
    - Lump Sum: Give staff a set number of hours of leave per year.

- ○ Percent Per Hour: Leave is earned based on billed time that is entered into your System using TA, PA, and Training Entries.
  - ○ Accrual: Leave time is earned based on a rate that is set up in the Staff Profile. Accrual can be monthly, weekly, per pay period or other time period For this option, you must also select if accrual time will be earned at the:
    - ■ End of the time period
    - ■ Beginning of the time period
- **Merit Integration:** Merit is an optional module where users can be given access to online prerecorded professional development trainings on non profit management. This is a paid upgrade. Contact CM support for more information.
- **Public layout login button text:** If text is added to this field, a button with a link to the System Login page will be displayed on all public pages.
- **Visible Public Directory Filters:** Select the fields that will be displayed as filterable options in the Public Directory. When none are selected, all default filter options will be visible.

Customizable Text:
The following fields are used to customize the text throughout the System. In some sections, stock language is used if there is no custom text.
- **Text for login required:** Text entered here will appear when an individual attempts to perform an action that requires log-in status. Otherwise, the default text is "Login Required for Submission."
- **Join Us Page Text:** Enter custom text that will appear at the top of the Join Us page. Otherwise, the default text is "JOIN US. Thank you for your interest. Please provide the following information and we will contact you shortly."
- **Invoice Custom Text:** Enter custom text for membership invoices. This text will show up under your organizational contact information on membership renewal invoices only (not on training invoices).
- **Donation Page Text:** Enter custom text that will appear at the top of the public Donation Now page. Otherwise, the default text is "NEW DONATION. This is for a donation only, please login to pay membership dues."
- **Training Search Page Text:** Enter custom text that will appear at the top of the public Training/Events page. There is no default text for this page.
- **Resource Page Text:** Enter custom text that will appear at the top of the Resource Summary Search page. There is no default text for this page.
- **Public Directory Page Text:** Enter custom text that will appear at the top of the Public Directory page. Otherwise, the default text is "PUBLIC DIRECTORY. All Contacts in Public Directory."
- **Verify Page Text:** Enter custom text that will appear at the top of the membership renewal page when an organization is required to update their contact details. There is no default text for this page.
- **Registration Confirmation Text:** Enter custom text that will appear when someone successfully registers for an event. Otherwise, the default text is "Thank you for registering! You'll receive a confirmation email soon. If you have any questions about this event or your registration, please reach out to us."`
- **Member Affiliation Label Text:** When "Enable Member Affiliation" is checked, this box will appear and allow you to customize the text that appears on the Public Join Us page.

SHARE PUBLIC LINKS

Click the Public Links button at the top of the page to be directed to the section where you can copy any of the links for use on your website or other public location.

NOTE   *The Public Links section is only visible when NOT editing the Coalition Specific Info.*

NOTE   *Contact CM Support staff to make edits to the text at the top of the page, to remove/add the Safe Escape button, and to add/remove a Membership login button. Some sites have specially-designed public pages differently and may not look exactly as described here.*

- **Join Us:** This page allows nonmembers or the general public to apply for membership and/or request access to your System.
    - If the "Affiliation" question is used, staff at member organizations can request an account and be listed under an Organization Contact profile.
    - The Join Us link can be added to your website and/or used with membership materials to give direct online access to join.
    - Depending on how it is set up in System Configuration > Contact Manager > Contact Type, requests submitted from the Join Us page can either require approval by your staff, or be automatically approved.
    - Only Contact Types that have been designated "Open for Public Registration" (in System Configuration > Contact Manager > Contact Type) will be available as options on the Join Us page.
    - When approval is required, an email notification will be sent to the designated Coalition/Network staff.
    - Approval and Denial of the request to join will send an email to the person who requested access.
    - Text at the top of the page can be customized. The "Affiliation" question (used for adding Contact Org staff) can be added/ removed. A link to the Join Us page can also be added to the bottom of your System login page. Contact CM Support to request any of these features.
- **Public Directory:** Contact information about Contact Organizations and other affiliated programs can be searched via the Public Directory.
    - Information will be displayed in the Directory only if the Organization Profile has checked the box "Display Contact in Public Directory."

        > Display contact in public directory?
        > ☑

    - The Contact Directory can be displayed privately (meaning, only visible to people when logged in) or publically (meaning, the link can be put on a website for the general public to search). The CM Support team can disable or enable this feature. If the Directory is visible to users when logged in, you can also limit which Contact Type(s) see the directory. This is set up in System Configuration > Contact Manager > Contact Type.
    - Information such as address or phone number can be kept out of the directory by deselecting "Is Public" in the Contact Details page.
    - Text at the top of the page can be customized by the CM Support Team.

- **Donate Now:** Use this page to allow people to make donations online via credit card or ACH Bank transfer (if enabled).
    - Sites often share this link via a "Donate" button on your website.
    - Donors automatically receive a thank you email and also an email to welcome them to log into your System.
    - Text at the top of the page can be customized by the CM Support Team.
- **Trainings/Events:** The Training and Events search page allows the public to search for upcoming events, view promo pages, and register for upcoming training.
    - If this link is shared publicly (i.e. on a website), events that are given the Access Level "Open to All" will be searchable on this page to people not logged in. If the dates of registration are open, the blue register button will be visible on the event promo page.
    - Events that are given the access level of "All Contact Types" or "Select Contact Types" will be searchable on this page. However, only people who are logged in and have the proper access will see the blue button to register.
    - Text at the top of the page can be customized by the CM Support Team.
- **Resource Summary:** This is a search page for all Resources within Resource Manager where the resource Access Level is "Open to All".
    - Resources restricted for certain contact types will not be accessible.
    - Views and downloads through this link will be tracked in the Resource Manager.
    - Text at the top of the page can be customized by the CM Support Team.
- **Resource Search:** This is another search page for all Resources within Resource Manager. It functions the same way as the Summary, but the layout is different and can be more user friendly.

PRO TIP CUSTOMIZE HEADER BUTTONS ON PUBLIC PAGES

When logged out of your System, the public pages will display your organizational logo at the top and your contact information, including social media links, at the bottom of the page.
- **Safe Escape Button Option:** A Safe Escape Button is located at the top of all public pages by default. When clicked users are taken to weather.com. This feature can be removed by request to the CM Support Team.
- **Membership Login Button Option:** A Membership Login button can be added to the top of public pages. This can be added by sending a request to the Support Team..

CREATE FAQs

Create and organize frequently asked questions that can be accessible for any users of your site. The FAQs are accessed by clicking on the carrot (˅) icon next to your name in the upper right of the screen or by clicking on the ? icon on the top of the screen. Depending on the access given to the FAQ, categories will be listed at the top of the screen and hyperlinked to the questions and answers in that section.

FAQ Category

Give the FAQ Category a name. Categories are required and you can also optionally add in subcategories. After saving, the Category will be visible in the dropdown when creating FAQs.

FAQ

Click **Add New** and then add**:**
- **Category:** Select a FAQ Category from the dropdown menu.
    - Subcategory: Select a subcategory if one is enabled for the Category. (This is not required.)
- **Question:** Enter question or title. For example, "How do I add a new contact?"
- **Response:** Enter the response or relevant information related to the Question. You can also format the text and add documents and hyperlinks as needed.
- **Publish?** Click this box to make the FAQ visible to users. (Unpublished questions allows you to continue working on a question without it being visible to users.)
- **Has Link?:** Select this box if you would like to display a clickable button below the FAQ, which will open another browser window to lead to the webpage.
    - Link Text: Enter the button text (i.e. "More Info")
    - Link: Paste the web link.
- **Access:** To make the FAQ visible to only select audiences, choose from the dropdown list which group(s) should see the question. Select none if the FAQ is open to all users.
- **Tags:** Use FAQs tags to group together topics. Users will be able to access everything with the same tag by clicking on the tag at the bottom of the question. For example, you may want to create tags for user instructions, technical assistance topics, or common themes. (Make sure the spelling is the same on every tag, otherwise they will not be grouped together.)

Contact Manager

Contact Manager is where you store and find details of your member organizations and their staff, stakeholder contacts, community partners, and other partners or users.

System Configurations are created to designate the different Contact Types, what information will be collected for each Contact Type, and access levels for users, and labels for various details in the Contact Manager Module.

Task	Access		
	Super Admin	Coalition Admin	Coalition Staff
Customize labels and descriptions for Contact Information and Additional Information sections.	☑		
Restrict fields in Contact Information so that Users cannot edit.	☑		
Customize options for: ● Program Services ● Counties ● Program Languages ● Program Types ● Regions ● Phone Number Types ● Contact Address Types ● Social Media Information Types	☑	☑	
Create and customize Contact Types ● Enable System Access by Type ● Enable Expiration Dates ● Require Fields and Additional Information ● Enable Public Registration ● Create Membership Dues ● Enable Payment Plans	☑	☑	
Create Membership Fee Discount Codes	☑	☑	
Create Organization Teams	☑	☑	
Add New Funding/Grant Sources ● Enable Funding Grant Sources as Default ● Attribute Staff Allocations to Funding Sources	☑	☑	
Create Mailing Lists ● Enable Mailing Lists as Default	☑	☑	
Create Custom Contact Manager Fields	☑	☑	

Reset User Passwords	☑	☑	☑
Unlock User Accounts	☑	☑	☑
Resend Welcome emails	☑	☑	☑
Bulk Upload Contacts	☑	☑	
Bulk Upload Staff lists for Contact Organizations	☑	☑	☑
Add processing fee for Membership Renewal when paid online	☑		
Set Up PTO accrual rates	☑	☑	

Addresses

Label options for different types of Addresses that will be available for Individual Contacts and Contact Organizations to select when they are updating their Contact Details. Contacts can select multiple different types of address, such as: PO Box, Shelter, Mailing Address, etc.

Addresses have the following settings:
- **Address:** Create the label for the address type (i.e. PO Box, Main Office, etc.)
- **Does this address have staff?:** Check this box if you would like to be able to assign staff to this type of address.
  - Note: At least one address must indicate it has staff to associate staff with an organization.

Contact Type

Contact Types are ways to group, organize, and categorize Contacts. Contact Types can be users (people who will log into your System to access designated information) or non-users (their Contact Details are for your organization's purposes only and they will not log in).
- **Contact Type:** Create the label name for the Contact Type (i.e. Program Members, MDT Partners, Government Agencies)
- **Information to Display:** Click into the gray box to display the options. Select information you would like to collect for all contacts in this Contact Type. The dropdown items for all of the fields in this section are able to be updated by your System Admins.

    Options in this section include:
    - **Contact Address*:** Displays one or more Contact addresses.
    - **County*:** Displays counties served by the Contact.
    - **Phone Numbers*:** Displays one or more Contact phone numbers.

An asterisk notes searchable options in the Public Directory.

- ○ **Program Languages*:** Usually used for Contact Types that are Organizations, this field will display service language(s) provided by the Contact Org.
- ○ **Program Services*:** Usually used for Contact Types that are Organizations, this field will display services provided by the Contact.
- ○ **Program Types*:** Usually used for Contact Types that are Organizations, this field will display the type of larger program or organizational categories offered by this Contact Organization, such as Child Advocacy Services, Shelter, Batterer Intervention Program, Hospital, etc. This is a filter criteria that helps group like-services and should not be mistaken for Program Services, which is a different field.
- ○ **Regions*:** Usually used for Contact Types that are Organizations, this field will display the regional service area.
- ○ **Social Media Information*:** Usually used for Contact Types that are Organizations, this field will display one or more weblinks, such as agency websites, Facebook pages, etc. Information entered here will be hyperlinked in the Contact Details and in the Public Search, if using.
- ○ **Staff List*:** Used for Contact Types that are Organizations, this field will allow the creation of user profiles and/or the ability to display a staff listing on the Contact Details and in the Public Search, if using and indicated in the staff profile.
- ○ **Mailing List:** This option is only relevant for Contact Types that are Individuals. This will display all mailing lists in your system so that the Contacts has the option to select to join any of the lists.

> **⭐ NOTE** *You also have the option to automate the process of associating all contacts in a Contact Type to a specific mailing list. See info below.*

- ○ **File Upload:** This option will provide a space to upload files (such as membership policies, board lists, etc.) to the Contact Details page. Files can also be uploaded and given an expiration date. See below for details. Contact Admins as well as Coalition/Network staff will be able to access these files.
- ○ **Logo*:** This option will provide a space to upload and display an organizational logo on the Public Directory.
- ● **Allowed System Access?:** Check this box to make all Contacts and staff (for Contact Orgs) in the Contact Type users in your System. Checking this box will automate the process of creating a User Profile for each new person entered in the Contact staff list. New users receive an automated welcome email, which prompts them to set up a password to log in. Once logged in, users can update their details, register for members-only trainings, and access resources and forms specifically open to them.
- ● **Has Expiration Date?:** This feature allows you to determine a schedule when all Contacts in the Contact Type will expire. This creates an opportunity for Contacts to do things such as pay renewal fees, update contact information, or check staff lists. As the expiration date approaches, automated emails will be sent to the main point of contact (as well as others, if indicated) on the following schedule: 30 days, 10 days, 7 days, 3 days, and 1 day prior to expiration date, and 1 day and 10 days after membership has expired. When the Expiration Date feature is activated for the Contact Type, the following additional questions will need to be answered:
  - ○ Stay visible to public when expired? Will allow public details of all Contact Organizations in this Contact Type to remain visible in the Public Directory even after their expiration date has passed.
  - ○ Expiration Date Type:

- - ■ Fixed: All Organizations in the Contact Type will expire on the same date each year.
    - ■ Annual: Every Contact Organization in the Contact Type will expire one year from the date the renewal was completed. (i.e. If a Contact's renewal is completed on 04/01 , their expiration date for next year will be 04/01.
- **Open for Public Registration?:** Select this box if you would like this Contact Type to be accessible in a drop down menu on the Join Us page. This would allow the general public to apply to become a member of this Contact Type.
    - ○ Contacts need to be Approved?: Check this box if you are using the Join Us page for public applications to this Contact Type and you want to have a chance to preview and approve/deny applicants. When this box is checked, applicants from the Join Us page would receive an email that their request is pending. Also, a member of your organization would also receive an email notifying them that a Join Us request has been submitted. If this box is NOT checked, the applicant will immediately be approved and if they are a user, they will be sent an email to create a password to log into Coalition Manager.
    - ○ Contact Staffs need to be Approved?: Check this box if you are using the Join Us page for applications by staff at Contact Organizations and you want to have a chance to preview and approve/deny applicants. This feature works like the one mentioned in the bullet point above.

> ✦ **NOTE**   *If you want users to be able to join as Contact Staff, but not create new Contacts, "Open for Public Registration" does not need to be checked.*

- **Allowed Public Directory Access?:** Check this box if you would like this Contact Type to have access to the Public Directory when they log in. The Public Directory will appear as an option on the left side list of modules.
- **Create a Mailing List?:** This box is only visible when first adding a new Contact Type. Check this box to create a mailing list that has the exact same title as this Contact Type. The Mailing List will be created in both CM and in the email marketing system. Once the Contact Type is saved, Contacts can be added to the Mailing List either one-by-one in the Contacts Details pages, or by association based on Contact Type. See the Mailing List Associated field below for more information.
- **Membership Agreement Link (if any):** Place a hyperlink to a membership document in this field. When a web link is added to this field, it will add the link for contact organizations to see at the bottom of the membership renewal page. Before submitting their renewal, they will be required to click a box verifying their agreement, like this:

☐ I understand that by submitting payment for membership, I agree to follow this Membership Agreement.

- **Additional Information:** Click into the gray box to display and select additional information you would like to collect for Contacts in the Contact Type.

> ✦ **NOTE**   *These labels can be customized and may have been changed in your system. Contact the Support team if you are interested in customizing these options.*

- Additional Info options include:
    - ○ Is 501(c)(3)? (Responses will be Yes/No)
    - ○ Is DVSS Contractor? (Responses will be Yes/No)
    - ○ Annual Budget: When a number is entered here, it can be used to help calculate a membership fee when dues are based on a percentage of an organization's budget.

- Membership Fee: If your System will collect annual fees for Contacts within this Contact Type, you must select this field. When your staff views the Contact Details page, they can see this field and manually override the Membership Fee structure set up here in System Configuration. Enter a unique payment amount for organizations one-by-one.
- Annual Program Budget: There are two options to collect program budgets, which can allow you to track separately certain program budgets that you need to compare.
- Year Incorporated
- Program/Organization Start Year: There are two options to collect startyears, which can allow you to track separately two different program's start years.
- Number of Board Directors
- Number of Staff Members
- Number of Volunteers
- Number of Shelter Beds
- Number of Transitional Housing Beds
- Notes: This field is only visible to your staff. It allows you to type notes about the Contact.
- Mission Statement
- Payment Reminder Email: This allows Contacts to enter additional staff to receive reminders about upcoming membership renewals and approaching fees.
- Training Compliance Reminder Email: This is only used when the Training Compliance Feature is enabled. It will allow Contacts to enter an email address of the Contact Org Staff who will receive an email notification when a staff person has not yet completed their required trainings for certification. Contact the CM Support Team for more info on this feature.
- Parent Organization Name
- Is Subsidiary of an organization? (Responses will be Yes/No)
- Federal ID Number

- **Modules Associated:** If the Contacts in this Contact Type will have system access, select the modules they will be able to see when logged in. User Module options include:
  - **Contact Manager:** This Module allows users to view their own contact information. Staff Administrators at Contact Organizations will be able to update the organizational information, staff listings, and perform renewals in the System.
  - **Training:** This Module allows users to view and register for upcoming trainings and ELearning Courses that are open to their access level. They can also look at training records, which may include downloading certificates, copying Zoom Join links, and paying invoices. The Training Module also allows users to enter data on trainings they attended that were not facilitated by your Organization. Staff administrators at Contact Organizations are able to view training records and run training reports of other staff at their organization and other associated contacts.
  - **Donor:** This Module allows users to easily make donations and view their own past donation records.
  - **Resource Manager**: Allows users to view and/or download resources that are open to their access level. When users access resources when logged in, the System will show who accessed them and on what date.
  - **Custom Forms**: Allows users to view forms and submit data in forms that are open to their access level. They will also be able to view past forms that have been saved and/or submitted by them and others within their organization (when permissions are set for the whole contact).
  - **Merit**: If your System is using the Merit professional development module, you can differentiate who has access to Merit by selecting it here in the Contact Type.

- **Default Fee Options:** Select from the dropdown menu the type of membership payment structure that will be required for all Contacts in the Contact Type. If the Contacts do not pay any dues, select No Fee. Depending on your selection, additional fields may appear. Also note that these fee options might not appear if you do not have the associated fields selected in the Additional Information section. Fee options include:
    - **No Fee:** Use this when this Contact Type pays no membership dues or when they are not given System Access. If a Contact Type has no fee but is given an expiration date in the Additional Info section above, they will receive an end of year renewal email, which prompts them to verify/update their contact information.
    - **Default Fee in US Dollars:** Select this option when the fee is the same flat rate for all contacts in the Contact Type.
        - Default Membership Fee: Enter the amount that all Contacts in this Contact Type must pay each year for renewal.
    - **Default Fee in Percentage of Annual Fee:** Your system will calculate the Contact's annual fee based on a percentage when the contact has an amount in their Annual Budget field. (To use this Fee structure, be sure to select the Budget field in Additional Information):
        - **Fee (% of Annual Budget):** Enter the percent of the annual budget you would like to charge. For example, if you would like members to pay 5% of their annual budget, enter 0.05.
        - **Lower End and Higher End:** Use these fields to set a minimum and maximum range to charge an organization, regardless of their budgets. This helps to keep costs from being too high or too low. For example, if you would like the membership fee to max out at $5,000, regardless of their Annual Budget, enter 5000 in the Higher End field.
    - **Sliding Fee in US Dollars:** Select this option to create structured ranges of payment that will be based on the amount entered in the Organization's Annual Budget field. (To use this Fee structure, be sure to select the Budget field in Additional Information). Create as many categories as needed by clicking on "Add Sliding Fee Structure" and then entering the following information:
        - **Min Range:** Enter the minimum range of the annual budget. For example, if you would like contacts to pay $50 if their annual budget is between $1,000 - $100,000, the min range is 1,000.
        - **Max Range:** Enter the maximum range of the annual budget. In the example above, the max range is 100,000.
        - **Fee:** Enter the fee for the range. In the example above, the fee is $50.00.

⭐ NOTE *Numbers cannot be duplicated - so if your range is $100,000-250,000, the min range that you enter for the next range up should be $250,001.*

    - **Sliding Fee By Number of Staff:** Select this option to create structured ranges of payment that will be based on the Contact Org's staff size. (To use this Fee structure, be sure to select the Number of Staff field in Additional Information). Create as many categories as needed by clicking on "Add Sliding Fee Structure" and then entering the following information:
        - **Min Range:** Enter the minimum number of staff in this range. For example, if you would like contacts to pay $50 if they have 0 to people on staff, the min range is 0.
        - **Max Range:** Enter the maximum number of staff in this range. In the example above, the max range would be 5.
        - **Fee:** Enter the fee for this range. In the example above, the fee is $50.

- ○ **Payment Plan Option:** Select an option to allow all Contacts within the Contact Type to pay their annual renewal fee on a set schedule throughout the year. When a payment plan is selected, contacts can choose to pay the entire fee all at once, or select a payment plan. Payment Plan Options include variations of the following:
    - ■ **Monthly:** Due once per month.
    - ■ **Quarterly:** Due once every 3 months.
    - ■ **Biannually:** Due two times per year.
- ○ **Enable Custom amount Pament**: Select this field if are allowing Contacts to pay with a payment plan and you would like to allow them to choose how much they pay each time. Without selecting this, the only payment options available will be total remaining balance or the set amount (monthly, quarterly, etc.).

PRO TIP ## CREATE NO FEE RENEWALS

When Contacts do not pay an annual fee, you can require them to perform a yearly update to verify that their information is correct in your System. This will help keep your records up-to-date and is recommended for all users who do not otherwise perform annual renewals. As the expiration date approaches for the Contact, they will receive a reminder email. They will also see a button at the top of their Contact Details page, which says Verify. This button will lead them to a page where they can view/update their information.

In the Contact Type, select the expiration date field and then select "No Fee" in the Payment section. This will automatically set the No Fee Renewal feature into place. You must also remember to add fields into the Required Information fields in the Contact Type. See below for more details.

- ● **Mailing Lists Associated:** Click into the gray box to display all mailing lists saved in your System. Select any mailing list(s) to create an association so that whenever Contacts or Contact Staff are added into Contact Manager, their email address will automatically be added to the mailing list(s) in your email marketing system..
- ● **Display Name Priority:** This field allows you to differentiate between Contacts that are people (i.e. Individuals) and Contacts that are Organizations. This field determines how the Contact will be displayed in data grids and search fields across your system for this Contact Type.
- ● **File Upload Instructions:** If you are using the File Upload field in the Information to Display in the Contact, you can add text here to give more details about types of files they should put in their Contact Details page. For example: "Please upload your MOU here."
- ● **Required Information and Required Additional Information:** This field is used for contact renewal. It allows you to set required sections that must be reviewed and verified before the Contact can renew each year. Contacts must have data entered in the field in order to move onto the renewal page.
- ● **Other Associated Contact Types:** This field is used to give Coalition Staff the ability to create connections between two Contact Types. You will be able to grant access so that staff at one Contact Organization can view some records of someone in another Contact. Select the Contact Type(s) that should be visible. For example, to allow Child Advocacy Centers the

ability to view information on MDT Members, go to the Contact Type page of the Child Advocacy Centers and select the Contact Type "MDT Members".

- Associations can be made in three ways. *It's recommended that CM Support Staff create the initial set up for Associated Contacts. However, your site admins have the access to set it up themselves.* Please reach out to the CM Support Team for help with setting up any of the following:
  - **Associated Training Records:** Contacts can conduct a filtered training search of associated attendees, view training records and certificates, and register associated contacts for events and E-Learning.
  - **Associated Contact Details:** Contacts can view but not edit associated contact details.
  - **Associated Custom Forms:** Contacts can view the form submissions of their associated contacts.

PRO TIP **TRACK HISTORICAL ADDITIONAL INFORMATION DATA**

Your contacts and users can view the history of their additional information in contact details. Your staff can view the same information in contact details and in a compiled grid, "Contact Additional Information." Your site admins can define the additional information that will be recorded by setting requirements for each Contact Type here in System Configuration. When a user renews, they can update the required information and verify that the information specified is correct.

Contact Type Discount Codes

You can create discount codes for membership fees. Codes can be shared with organizations who would normally pay a renewal or membership fee, but are unable to pay the full amount. When a discount code is created in System Configuration, the Contact Organization enters the code in the renewal section to receive a reduced rate. Create multiple discount codes by clicking on Add Discount Code.

- **Contact Types:** Select the applicable Contact Type(s) for this code.
- **Code Name**: Create a name for the Discount Code so that it's easily identifiable by your staff.
- **Discount Code:** Whatever text you enter here must be entered exactly by the Contact in order to receive the discount.
- **Percentage:** Enter the percentage you would like to reduce membership amount due by. (i.e. Enter 50 for a 50% discount.)

County

The County list displays every county in the United States. Do not update or change any of the counties in this list. Your CM site has special coding which will populate the appropriate counties in your service area for your Contacts and Contact Organizations. If the list you see in Contact Manager needs to be updated, please contact the Support Team.

NOTE

Phone Numbers

Create label options for types of Phone Numbers that can be used for all Contacts in Contact Manager (i.e: Office, Hotline, Personal Cell, etc.).

Remember that contacts can have as many phone numbers as needed and contact organizations can select whether the phone number is public or private. Public phone numbers will show up on the Public Directory.

Funding/Grant Sources

Funding sources allow you to bill staff time, as well as attribute activities and entries to a funding source, which helps with staff timesheet reporting and reporting of grant deliverables. Funding or Grant Sources that are created here will populate in the billing or staff info sections in Technical Assistance entries, Project Activity entries, and Training/Events.

- **Source:** Create a name for the funding source so that it is easily identifiable to staff (i.e. Discretionary Funding, FVPSA Grant, OVC Grant)
- **Is Default?:** Click this box if this funding source should be visible by all staff. If this box is left unchecked, you must add the funding source to select staff in Contact Manager > Staff Listing.
- **Is Applicable to Case Manager?:** This option will only be visible on systems that have the Case Manager Module. Check this box if the funding source is used in Case Manager (i.e. Legal) Activities.

Mailing List

Your system is connected to an email marketing platform (sometimes called EMS) for the purposes of

NOTE automatically adding contacts to and organizing contacts in email marketing newsletter lists. Many systems are connected to MailJet for these purposes (since Mailet is already connected in order to send transactional email messages from your System); however, some systems use a different email marketing platform instead, such as ConstantContact, MailChimp, etc. Check with your System Admins for more specifics about which email marketing application is connected to your System.

Mailing Lists added in System Configuration will automatically be created in your EMS. In addition, certain associations can be made in System Configuration, as well as elsewhere in Contact Manager, so that designated Contacts and Contact Types can be automatically added to mailing lists in both your System and in your EMS.

If your System uses MailJet for email marketing, it will automatically transfer all donors to a "Donor Mailing List" in MailJet. All training registrants will also be placed in an"Attendee Mailing List MailJet. Therefore, you do not need to create mailing lists in
System Configuration for these purposes.

Contacts within a Contact Type can also be associated with a mailing list in System Configuration > Contact Manager > Contact Type. Contacts can also be edited locally to be added/removed from mailing lists.

- **Mailing List:** Create the name of the Mailing List. (i.e. "Monthly Newsletter" or "Membership Update")
- **Default Mailing List?:** Check this box to automate the process of adding every Contact and Contact Staff to this mailing list by default.
- **Select Contact Types:** If this list is not defaulted for all contacts, you can select one or more Contact Types from this list, which will associate all individual contacts and/or staff at contact organizations to automatically be added to the mailing list.

Contacts within a Contact Type can also be associated with a mailing list in System Configuration > Contact Manager > Contact Type. Contacts can also be edited locally to be added/removed from mailing lists.

Organization Team

Groupings are used to organize your site's staff. This is useful for generating reports based on teams. A staff member can only be a part of one Team.

- **Organization Team:** Create the name of the Team (i.e. Admin, Legal, etc.)
  - Labels are created in System Configuration, and then attributed to each of your staff members by going to Contact Manager > Staff List.
- **Has System Access?** Deselect this box if members of the team will not be granted CM access.

Language

Usually used for Contact Types that are Organizations, this list will display service language(s) provided by the Contact Org. Contacts can select one or more items from this list in their Contact Details page. Languages can be used as search criteria in the Public Directory.

Program Services

Usually used for Contact Types that are Organizations, this list will display services provided by the Contact. Contacts can select one or more items from this list in their Contact Details page. This field is multi-select by default, but can be changed to single-select if needed. (Reach out to CM Support to request that it be changed.) Program Services can be used as search criteria in Contact Directory and in the Public Directory. Program Services can also be used to track Technical Assistance Provided by your Coalition/Association/Network to Contacts providing that Service.

Program Types

Usually used for Contact Types that are Organizations, this list will display the type of larger program or organizational categories offered by this Contact Organization, such as Child Advocacy Services, Shelter, Batterer Intervention Program, Hospital, etc. Contacts can select one or more items from

this list in their Contact Details page. This field is multi-select by default, but can be changed to single-select if needed. (Reach out to CM Support to request that it be changed.) Program Types can be used as a search criteria in Contact Directory and in the Public Directory. Program Types can also be used to track Technical Assistance Provided by your Coalition/Association/Network to Contacts that are a specific Program Type.

Regions

If Regions are turned on for your System, this list will be used for Contact Types that are Organizations and will display the regional service area. Contacts can select one or more items from this list in their Contact Details page.

Social Media Information

Usually used for Contact Types that are Organizations, this list will display one or more weblinks, such as agency websites, Facebook pages, etc. Information entered in these fields in the Contact Details page will be hyperlinked. Social Media information can be displayed in the Public Directory for Contact Organizations, if allowed.

Contact Custom Fields

Custom Contact fields can be created so that your System will capture and store data that is not otherwise collected. Custom Questions can be attributed to specific Contact Types, and can be either visible or hidden from the Contact themselves. Custom Questions can also be displayed on the Join Us page and/or in the Public Directory. Build custom fields in the same way you build Custom Forms - first add a section and then add questions.
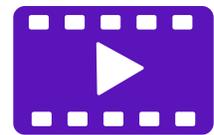
- **Add Section**
  - Section Title is a required field. The section will group all your custom questions together.
  - Display Mode can be changed to collapse if you want the questions to be hidden within the section. Clicking on the + sign would display the questions.
  - Display on Join us page? Click this field if you want new contacts to answer this grup of questions when requesting system access via the public Join Us page.
  - Visible to Contact? Click this field if you want this section of questions to be visible (editable) by the user).
  - Description is an optional field.
  - Applicable Contact Types: Select which Contact Types will be using this group of questions.
- **Add questions** (Please consult your CM Handbook for additional info and tutorial videos on each type of question.)
  - Select Display on Public Directory? Click this button if you want the answers to this question to show up in directy search results.

- ○ [Include in Public Directory Filter?](#) Click this button if you want the question to be a searchable field. Only certain questions can be filterable so this option will only be displayed for multiple choice, Staff Choice, or Grant Source questions.

Document Type

When a Contact Type is using the File Upload field, files can be grouped into Categories, which can be given expiration dates. Expiration dates force Contacts to upload new documents within a specified time frame. Email notifications can be sent to your staff and also to designated staff at the Contact Organization to let them know about documents that need to be updated.
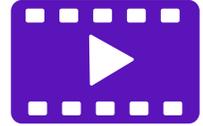
- **Document Type Title:** Give the Type a title that will help make it recognizable to your users. (i.e. Annual Membership Documents, etc.)
- **Set Effective Date and Expiration Date:**
  - ○ None: If you want to group the documents but you do not want them to expire.
  - ○ On Document Type: If you want all documents in this Type to expire within the same set time period.
    - Number of months the file is valid for
  - ○ On File Upload: If you want the documents in this Type to expire, but each upload can have its own schedule for expiration.
- **Is Coalition Staff Notified of Expired documents?**
  - ○ Enter the email address of staff(s) who will receive a transactional email notification when a file has expired.
- **Has Custom Email Reminder to User?**
  - ○ Create a custom email that will be sent to the address listed in the document uploaded.

Technical Assistance

The Technical Assistance (sometimes called TA) Module allows your organization to record and track information about capacity building support provided to your contacts, partners, and the public. Information entered in the Funding/Billing Source section will automatically show up in the staff time sheet. Contact the Support Team to customize the TA entry page to remove unneeded sections, make fields required, and/or relabel sections and descriptions.

Task	Access		
	Super Admin	Coalition Admin	Coalition Staff
Customize section headers and descriptions, remove fields, and rearrange order of sections.	☑		
Customize options for: ● Fulfillment Methods Used ● Assistance Types ● Occupations (if separate occupation lists enabled by Super Admin)	☑	☑	
Create Custom Technical Assistance Fields	☑	☑	

Fulfillment Method

Create options to document the ways in which the TA requests are completed. This is often a grant-reported item, i.e. how many TAs were fulfilled through email, phone, in-person, referral, etc.

Assistance Type Information

Create dropdown label options to record the subject areas of TA provided by your staff. Assistance Types can be grouped by main category, as well as sub category. For example, an Assistance Type of "Assistance with Underserved Populations" can have Sub Types such as "LGBTQI+ Populations", "Indigenous Women," "Housing Insecure," etc.
  ○ This is often a grant-reported item, so be sure to check your grant deliverables to ensure all reportable items are included in this list.
● **Assistance Sub Types:** Create the label for the Sub Types, if applicable.
  ○ If SubTypes are turned on for your CM site, click on the eye icon ◎ to add Sub Group Items.
  ○ Contact your Support Team if you do not have sub groupings and would like to request them.

TA Custom Fields

Custom TA fields can be created so that you can capture and store data that is not otherwise being collected in the TA Module entry. Build custom fields in the same way you build Custom Forms - first add a section and then add questions. Please consult your Handbook for additional info and tutorial videos.

Trainings/Events

The Training/Events Module allows you to create and manage events so that registration is automated, attendance is tracked, evaluations and/or certificates of completion are emailed to participants, and data searches can be run to report grant deliverables. Your staff can track their facilitation time by entering it into the Trainer section, and attribute it to a funding source. Contact the Support Team to customize event registration fields by updating labels and making registration questions required.

Task	Access		
	Super Admin	Coalition Admin	Coalition Staff
Add processing fee for fee-based trainings when credit card is used. Enable payment by ACH Bank Transfer.	☑		
Make training registration fields required for all trainings	☑		
Customize registration labels, such as Certification ID	☑		
Customize options for: • Accommodations • Release Information • Content Areas • Event Location • Event Types • CEU Types • Non Coalition Training Types • Occupations • Payment Methods	☑	☑	
Create Attendee Types • Designate associated contact types and visibility	☑	☑	
Create Custom Training/Events Details Fields	☑	☑	
Create Custom Registration Questions	☑	☑	
Create Pre-Req (if enabled)	☑	☑	

Attendee Type

Attendee Types create different groups of registrants that will pay different amounts for events with fees (i.e. Members, Non-Members, Sponsors). When a training is created, applicable Attendee Types are selected and given different fee structures.
- **Attendee Type**: Create a name.
- **Visibility**: Select who will be able to view and select the fee amount during the registration process. (*NOTE: Remember that the Training will also have an Access Level, making it possible that the registration button is only visible to certain contacts when logged in.) Options for Attendee Type visibility include:
  - **Everyone with/without a login**: Everyone who registers will be able to see and select this Attendee Type' associated fee, regardless of whether they are logged into CM or not.
  - **Contact Types**: Only the selected Contacts will be able to see and select this Attendee Type's associated fee. They must be logged in at the time of registration and their Contact must be a member of the Attendee Type.
  - **Only Coalition Staff**: Only logged in staff from your organization will be able to see this Attendee Type's associated fee.
  - **Everyone with login:** All logged in CM users will be able to see this Attendee Type's associated fee..
- **Contact Types**: Select the appropriate Contact Types that can select the Attendee Type.

Accommodations

This is the list of accommodations that are available for your staff to select as options for a training event.

Content Area

Content Areas are subjects covered in trainings/events. These are often grant-reported items, which funders require. When a training is attributed to one or more Content Area, you can run reports on the total number of trainings and/or attendees on XYZ Content Area(s). Content Areas can be broken into one group or a main group with sub groupings. Some examples include: Content Area of "Advocacy" with Sub Group Items of "Systems," "Legislative," and "Grassroots."
- **Content Area Groups**: Create the label for the Content Area.
- **Content Area Sub Groups:**
  - If Sub groupings are turned on for your CM site, click on the eye icon 👁 to add Content Area Group Items.
  - Contact CM Support if you do not have sub groupings and would like to request them.

Event Location

Training locations represent the overall scope of the training (i.e. Regional, State, Community, On-Site) and are usually needed for grant reporting purposes.

Event Type

Use these labels to create the dropdown list of the kinds of events you offer, such as Conferences, In-Service trainings, Seminars, etc. These are also often used for grant reporting purposes.

- If the Failure to Cancel feature is turned on for your System, you can select if that feature applies to the Event Type; meaning if someone fails to properly cancel their registration at an event of this type, it will prevent them and staff at their contact organization from registering for future events until a "blocK" has been resolved in the System.
- Registration Custom Fields and Payment Methods (see below) asks for Event Type to enable a specific customized registration field for all events in that Event Type.

CEU

Continuing Education Credits (CEUs) can be selected by staff when they create a training/event. During event registration, the attendee will select from the applicable list of CEUs to request CEU hours. In addition, the CEU field can be added to the Certificate of Completion so the CEU name and total hours awarded will be automatically filled on the certificate with the participant's name.

The CEU label may be removed or renamed to something more appropriate to your work.

Occupation

This is a list of occupations/disciplines that will be attributed to training registrants. This list is also used in Contact Manager for Contact and Staff Details. Options listed here typically are needed for grant report requirements. Registrants will select from this list when registering for an event.

Some Systems also use Occupation when entering Technical Assistance and Project Activity data. CM sites can be set up to use the same or different Occupation lists. Also, some Systems have changed the Occupation label and use another word, such as "Discipline". Contact the Support Team for more detailed information about how your Occupation list is set up on your System.

Non Coalition Training Types

Your users and staff at your organization can enter their own attendance data on trainings not offered by your organization. This is especially helpful in professions or States that have strict requirements for ongoing professional development or certification. Contact Admins can also run reports on the Non Coalition training data of all staff at their organization and associated contacts. Staff at your organization can also view the Non Coalition data of any user in your System. Labels created here are used to group the different types of trainings that are entered in the System (i.e. Professional Development; Non Profit Management; or Diversity, Equity and Inclusion). At least one type must be created in order for Non Coalition Training data to be entered.

This section can be hidden if it is not used in your System. Please email support@coalitionmanager.org to have this section hidden.

Non Coalition Trainer

Names added as Non Coalition Trainers will be displayed as Trainer options in Event Details. Hours and funding sources can later be attributed to Non Coalition Trainers. This is beneficial if you need to run reports on frequent training partners or consultants.

Information added into this section is optional and will not create any email notification or user accounts for this person.

Training Compliance

When this feature is enabled, this button will be displayed so that you create the parameters of the compliance(s). Training compliance allows your staff and the admins at contact organizations to track when their staff have completed yearly training.
- **Title**: Create a title for the Compliance rule so that it is easily identifiable.
- **Number/Hour**: Enter the number of trainings, the hours of CEU credits earned, or the amount of training hours that must be met to fulfill the requirement.
- **Event Mode**: Select how the rule will be applied, based on:
  - **Total Event Count**: Number of total trainings
  - **Total Participated Hours**: Amount of training hours
  - **Total CEU hours**: Amount of CEU hours awarded
- **Time Mode**: Select the time range, based on:
  - **In**: within a time range
  - **Every**: based on a recurring time period
- **Number**: Enter the amount
- **Term**: Select month, quarter, or year.
- **Add Options**: Select Training Type: Select the type of trainings where the rule will apply.

Release Information

Options of releases that will be available to select when creating an event (i.e. Photo Release, Privacy, etc.) These are questions or statements registrants check off when registering for an event/training. Each release can have a topic (or title) and further description.

Payment Method

Different payment options for training registrations can be created. "Online" is created by default and should always be an option unless you only collect fees through cash or check. Online payment with automatically connect with your payment processor (i.e. PayPal, Stripe) for payment via credit card and/or ACH Bank Transfer. . **Click here to see a video of the donation page with ACH bank transfer through Stripe.**

Other options (i.e. pay by check, pay at conference) etc. can be created. Payment types are then associated with Event Types so that you can accept different payment methods at different types of events, if needed.

Training Custom Fields

Custom Training fields can be created so that you can capture and store data that is not otherwise being collected in the Training/Events Module. Common questions created here might include a grant deliverable such as additional topic area. Build custom fields in the same way you build Custom Forms - first add a section and then add questions. Please consult the CM Handbook for additional info and tutorial videos.

☆ NOTE *This is not a registration question, but instead a place to create questions that must be answered by your staff when they create a new event. Reports can be run afterwards to gather data from these questions.*

Registration Custom Fields

Custom registration fields can be created so that you can collect data from registrations for all events in a specific Event Type. Common questions created here might include professional license information or Tribes/Sovereign Nations with whom you work.

Data from this field is visible in the Registrations page and can be included in the grid column menu or displayed in the registration as a column. Build custom fields in the same way you build Custom Forms - first add a section and then add questions. Please consult the Handbook for additional info and tutorial videos.

Pre-Req

If the training prerequisite feature is turned on, you will see this option, which allows you to create the labels for prerequisite trainings. Labels must first be created here in System Configuration, and then the prerequisite can be selected during the event creation in Training/Events Module. Events can either satisfy or require the prerequisite.

Donor Management

The Donor Module is used to collect and track donations and donor-related interactions. One-time or recurring donations can be made directly through your System when the donor wants to use a credit card or bank transfer; details about cash or check donations can be entered by your staff; and reports can be run on a variety of search criteria.
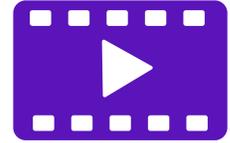
Task	Access		
	Super Admin	Coalition Admin	Coalition Staff
Create optional amount for donor processing fee	☑		
Customize options for: • Donor Tags • Interaction Methods	☑	☑	
Create Custom Donation Fields	☑	☑	
Create Custom Donor Fields	☑	☑	
Donation Import	☑	☑	

Donation Tags

Donation tags are used so that the donor can designate a purpose or fundraising campaign for their donation. Example donation tags are: Giving Tuesday, Annual Fundraiser, Survivor Fund. When no tags are created, the tag option is hidden on the donation page.

Donor Interaction Methods

Interaction methods are the ways in which your staff keep in touch with donors. Your staff can enter data each time they have a "touchpoint" with a donor.

Donor Profile Custom Fields

Extra fields can be added to the donor profile so that you can capture and store information about a donor that is not otherwise collected.

Donation Custom Fields

Extra fields can be added to the donation page, which will be displayed for online donors to fill out. Build custom fields in the same way you build Custom Forms - first add a section and then add questions. Please consult the Handbook for additional info and tutorial videos.

PRO TIP   **IMPORT DONOR DATA**

To import information about multiple donors or donations, go to Donor Module > Donation Import, then download the template. Complete the template. First name, last name required fields. Back in your System, select the file from your computer. Once it shows in the gray box, you are ready to import donations and must click the Import button at the bottom of the page. Donations with email addresses of existing donor profiles will have data from their profile included in the donation grid. New donor profiles are created for donors with new email addresses..

Project Activity

The Project Activity (PA) Module is used to record data about projects, meetings, or support tasks performed by your staff. If you are using the Time Tracker Module, data entered into the Staff Involvement section will be added to the staff timesheet. Contact your Support Team to customize PA entries to remove unneeded sections, make fields required, and/or relabel sections and descriptions.

Task	Access		
	Super Admin	**Coalition Admin**	**Coalition Staff**
Customize section headers and descriptions, remove fields, and rearrange order of sections.	✓		
Customize options for: • Projects and Sub-Projects • Publications • Occupation List (if enabled)	✓	✓	
Create Custom Project Activity Fields	✓	✓	

Projects

Projects can be divided into three levels of drop-downs - Projects, Sub-Projects, and Activities. For example, if you need to be very specific in your data tracking, a staff person can create a PA entry where the Project is "Policy Development", the Sub-Project is "Local/Statewide," and the Activity is "Lobbying." If you do not need this level of specificity your Support Team can remove the levels.

- **Project Name**: Create the label for the Project.
  - **Sub Projects and Activities**: Create the label for the Sub Projects and Activities.
    - If Sub groupings are turned on for your System, click on the first eye icon 🔍 to add Sub Project Items.
    - Click the second eye icon to add Activities.
    - Sub Projects and Activities are both sub groupings of Projects.
    - Contact your Support Team if you do not have sub groupings and would like to request them.

Publication

This is a list of commonly distributed products that can be tracked when entering a new TA, PA, or Training. When a publication label is created here, it will be displayed throughout your System so that distribution counts can be added, which allows you to run reports on the number of publications distributed. Contact your Support Team to add or remove the publication sections in the Technical Assistance, Project Activity, or Training/Events Modules.

PA Custom Fields

Extra sections can be added to the PA Entry page so that you can record data about your projects that are not otherwise being captured. Build custom fields in the same way you build Custom Forms - first add a section and then add questions. Please consult the Handbook for additional info and tutorial videos.

Time Tracking

Billed time that is entered into Trainings, Technical Assistance, and Project Activity entries automatically is added to the Time Tracker Module. Time not reflected in these modules is added in Time Tracker through Activities.

Task	Access		
	Super Admin	**Coalition Admin**	**Coalition Staff**
Edit Pay Periods	✅		
Turn on/off PTO Accrual Tracking	✅		
Turn on/off Yearly Full Time Equivilent Tracking	✅		
Turn on/off billed time with hours/minutes	✅		
Customize Time Activity Options	✅	✅	
Set rates for Staff to Accrual PTO	✅	✅	
Reveiw, Approve, and/or Deny leave requests and timesheets	✅	✅	✅ Only designated supervisors

Time Activities

Time Activities represent time blocks not reflected in TA, PA, or Training and are entered directly in the Timesheet. Timesheet Activities are usually leave/PTO categories (i.e. PTO, Holidays) and may also include time worked that is not a specific grant deliverable (i.e. Administrative Tasks, Meetings).

Activity Title: Name of activity
- **Is Billed?**: If this box is checked, staff will be required to select a funding source when they enter time for this activity.
- **Is approval required?:** If this box is checked, the activity will be listed on the Timesheet as "pending" until a supervisor or Admin approves the request. When the activity is first saved, the supervisor will be emailed a notification of this request. (*NOTE: Supervisors are set up in Contact Manager > Staff List.)
- **Color:** The color on the timesheet for Time Tracking Activities is defaulted to black. Select from any other color to differentiate activities by different colors.

● **Is PTO?**: If the PTO Accrual feature is enabled on your CM site, you will see an option here to designate the Activity as PTO. Checking this box means that you can set a rate for the number of leave hours accrued for this activity per month. Accruals are created in Contact Manager > Staff List.

TRACK PTO ACCRUALS

When PTO Accruals is turned on, your System Admins can set up Staff's accrual rates for leave categories. Then, staff will earn time based on the designated rate. When approved, time off will automatically deduct from the remaining balance. Contact your Support Team to turn on your PTO accrual.

There are three options for PTO Accruals:
1. **Lump Sum**: Give staff a total amount of leave hours for the year, which they can deduct from as they are approved leave requests.
2. **Percent Per Hour:** Designate a rate with which staff will earn leave time based on the amount of billed time they enter into Coalition Manager through the PA, TA, and Training Modules.
3. **Accrual:** Designate a rate with which staff will earn leave time based on the passage of days, weeks, or months.

Resources

Resource Manager allows your staff to upload documents and links, and then share those resources at different permission levels (i.e. users or the general public). Use System Configuration to create the groupings and access level for how resources will be stored and retrieved. Resources can be saved in categories and subcategories. A group of resources can also be created.

Task	Access		
	Super Admin	**Coalition Admin**	**Coalition Staff**
Customize Resource Categories and Sub-Categories	☑	☑	
Customize Resource Groups	☑	☑	☑

Resource Categories

NOTE Create the label for the category name.
- **Visible to Public?:** If this box is checked, the category will be visible to the Public when a resource is in the category that is also visible to the public.

Remember that access to a resource can be customized in the Resource's details. Even if the category is designated as "Public", the Resource can be limited to select users. A category should be made public even if there will be a mixture of both public and private materials in the category.

- **Sub Categories:** If Sub groupings are turned on for your CM site, click on the eye icon 👁 to add Sub Categories of Categories.
- **Sub Category:** Create the label for the Sub Category.
  - Contact your Support Team if you would like sub categories and would like to request them.

Resource Groups

Resources are a great way to share multiple things at once. For example, if you want to share follow-up materials from a conference, you can use a Group of resources and share PowerPoints, handouts, etc. all with one link. Resource Groups have a file folder that displays the number of resources within the group. Once the user accesses the group resource, they'll see a description of

the overall group at the top of the page, and then each individual resource below. Your users can download, view and filter by tags from this view.

Resource Group names can be created in System Configuration or in the Resource Manager Module, as resources are uploaded.

Custom Forms

In the Custom Forms Module you can build a wide variety of forms including training surveys, data collection tools, order forms, human resource forms, and more. Create your form categories here in System Configuration. Categories can be thought of as file folders that hold groups of forms together, which makes it easier for you and your users to find the forms. Some example Custom Form categories might include: Training Forms, Membership Forms, Service Reports, Internal Staff Forms, etc.

Task	Access		
	Super Admin	Coalition Admin	Coalition Staff
Customize Custom Form Categories	✅	✅	

Custom Form Categories

- **Category:** Create the label for the category name. This category will show up in the dropdown menu when you create your forms.

Super Admin

The Super Admin Section of System Configuration is only viewable and accessible by Coalition Manager Staff. This section is used for quick and easy customization of your CM site and allows for label changes, adding/removing sections in various module entries, and other changes.

Contact Coalition Manager Support to request any changes to the information mentioned here.

Super Admin	Customize section titles for Contact Manager, TA, Training, and PA
	Customize descriptions of sections for Contact Manager, TA, Training, and PA
	Customize additional info fields for Contacts
	Remove ability for Contact to update Contact Info Fields
	Reorder sections for Contact Manager, TA, and PA
	Customize text fields in training registration fields
	Enable use of different occupation lists for TA, Training, and PA
	Make certain sections and fields required for TA and PA
	Remove sections for TA, Training, and PA
	Enable Applicable Grant Sources for TA, PA, and Training
	Enable sub-types for TA and Training
	Make certain training registration fields required
	Enable module access for public use
	Enable module access for the entire site
	Customize names of Modules
	Customize Module descriptions

Contact Information

This section allows for the following label and description changes in the Contact Details pages in Contact Manager Module. Any of these details can also be "locked" so that the User Admins cannot edit the information. For any of the following fields, check the box "Contact cannot edit" to limit

data entry for that section. When this box is checked, the contact will need to notify your staff to make changes to the section.

- **Contact Address**
- **County**
- **Phone Numbers**
- **Program Languages**
- **Program Services**
- **Program Types**
- **Regions**
- **Social Media Information**
- **Mailing List**
- **File Upload**
- **Logo**

Additional Information

Labels and descriptions can also be changed in the Additional Information section at the bottom of Contact Details pages in Contact Manager:

- **Is 501(c)(3)?** (Responses will be Yes/No)
- **Is DVSS Contractor?** (Responses will be Yes/No)
- **Annual Budget**
- **Annual Program Budget**: There are two options to collect program budgets, which can allow you to track separately for things like Domestic Violence Budget vs. Sexual Assault Budget.
- **Membership Fee**
- **Year Incorporated**
- **Program/Organization Start Year:** There are two options to collect startyears, which can allow you to track separately for things like Domestic Violence start year vs. Sexual Assault start year.
- **Number of Board Directors**
- **Number of Staff Members**
- **Number of Volunteers**
- **Number of Shelter Beds**
- **Number of Transitional Housing Beds**
- **Notes**
- **Mission Statement**
- **Payment Reminder Email**
- **Training Compliance Reminder Email**: Only applicable to sites with the Training Compliance Feature enabled.
- **Federal ID Number**
- **Is Subsidiary of an organization? (Responses will be Yes/No)**
- **Parent Organization Name**

PA Information

Update any of the following section headings and intro texts in a Project Activity entry:

- **Report Basic Information**

- **Staff Involvement**
- **Project Information**
- **Report Status**
- **Participants**
- **PA Occupation**
- **Publications Used**
- **Regions & Travel Information**
- **Executive Summary**
- **Staff Notes**

PA Settings

- **PA Fields:** Deselect any of the following to remove the section from the PA Entry page:
  - Sub Project
  - Activities
  - Reporting Staff
  - Reporting Dates
  - Region Information
  - Travel Information
  - Stored Participants (which pulls participant info from Contact Manager)
  - Other Participants
  - Total Participants Count
- **PA Occupation List Type:** In order to accommodate multiple grants that may all track different types of occupations, CM can either use one consistent list of occupations or use different lists in different modules. Here are the options:
  - Separate List: Use 3 different occupation lists (one in Contact Manager/Training Modules, one in the TA Module, and one in the PA Module). (*NOTE: if this option is chosen, please also be sure to add the TA Occupation section by checking the box "Use Seperate TA Occupation" in the TA Settings.*)
  - TA Occupation List: Have the PA Occupation list be the same as the list in the TA Module.
  - Training Occupation List: Have the PA Occupation list be the same as the list in the Contact Manager/Training Modules.
  - Same List: Have the same Occupation List in all CM Modules.
- **PA Required Fields:** The following fields can be made required so that your staff cannot submit a PA entry without putting information into the field:
  - Start Date
  - End Date
  - Reporting Staff
  - Region
  - Miles Traveled
  - Awaiting Staff
  - Contact Participant
  - Other Participant
- **PA Sections:** Cut down on unnecessary data entry/collection by removing sections of the PA Entry page when it will not be needed. Any of the following sections can be removed:
  - Report Basic Information
  - Project Information

- ○ Participants
- ○ PA Occupation
- ○ Staff Involvement
- ○ Publications Used
- ○ Regions and Travel Information
- ○ Executive Summary
- ○ Staff Notes
- ○ Report Status
- **Required Sections:** Any of the PA sections above can be made required. Making a section required means that the staff cannot submit a PA entry without putting information into at least one part of the section. (*NOTE: If a particular field in a section is important, make the field required instead of/in addition to the section.)*

TA Information

Update any of the following section headings and intro texts in a Technical Assistance entry:
- **Request Information**
- **Funding/Billing Source**
- **Recipient Information**
- **Assistance Type Information**
- **Recipient Occupation**
- **Publication Used**
- **Applicable Funding/Grant Sources** (only used when the feature is turned on)
- **Fulfillment Method**
- **Executive Summary**
- **Notes**
- **Fulfillment Type**

TA Settings

- **TA Fields:** Deselect any of the following to remove the section from the TA Entry page:
  - ○ Requested Date
  - ○ Receiving Staff
  - ○ Stored Contact (which pulls contact info from Contact Manager)
  - ○ Recipient Name
  - ○ Recipient Address
  - ○ Phone Number
  - ○ Fax
  - ○ Email
  - ○ Completion Status
  - ○ Awaiting Action
  - ○ Applicable Grant Sources: This is a robust feature that allows your CM site to have a different list of TA Assistance Types, depending on the funding source. It applies other actions across CM, based on the funding source. Contact CM Support for more information and to turn on this feature.)

- Separate TA Occupation: This section should be added when separate occupation lists are being used in the TA Module and the PA Module (*NOTE: Make sure to also select "Seperate List" in PA Settings > PA Occupation List Type.)
- **TA Required Fields:** The following fields can be made required so that your staff cannot submit a TA entry without putting information into the field:
  - Date Requested
  - Receiving Staff
  - Contact Type
  - Contact
  - Contact Staff
  - Street Address
  - City
  - State
  - Zip
  - Email
  - Awaiting Staff
  - Phone
  - Fax
- **Assistance Type Format:** Select whether the TA Assistance Type list will be a single list or a list with assistance types and sub types.
- **Content Area Format:** Select whether the Training Content Area List (used in the Training/Events Module) will be a single list or a list with content area groups and items (sub groups)
- **TA Sections**: Cut down on unnecessary data entry/collection by removing sections of the TA Entry page when it will not be needed. Any of the following sections can be removed:
  - Request Information
  - Recipient Information
  - Recipient Occupation
  - Assistance Type Information
  - Publication Used
  - Fulfillment Type
  - Funding/Billing Source
  - Fulfillment Method
  - Notes
  - Executive Summary
  - Applicable Funding/Grant Source (This should only be added when the feature is turned on.)
- **Required Sections:** Any of the TA sections above can be made required. Making a section required means that the staff cannot submit a TA entry without putting information into at least one part of the section. (*NOTE: If a particular field in a section is important, make the field required instead of/in addition to the section.)

Training Information

Update any of the following fields that are used when training attendees register for an event in the Trainings/Events Module:
- **Organization**
- **Street Address**

- **Street Address 2**
- **City**
- **State**
- **Zip**
- **Country**
- **Email**
- **Phone**
- **Extension**
- **Occupation**
- **Job Title**
- **Certification Id**

Registration Page Settings

The following fields can be made required whenever a training attendee registers for an event in the Trainings/Events Module:
- **First Name:** This field should be made required because it is a system requirement.
- **Last Name:** This field should be made required because it is a system requirement.
- **Organization**
- **Street Address**
- **Street Address 2**
- **City**
- **State**
- **Zip**
- **Country**
- **Email:** This field should be made required because it is a system requirement.
- **Phone**
- **Extension**
- **Occupation**
- **Job Title**
- **Certification Id**

Module Lists

The following are Modules that can be added/removed from a CM Site. Each module can have its name and description customized and designated to be hidden or shown to the public, which allows access when not logged in to CM. *Modules with a * are not recommended to be shown to the public*.
- **Contact Manager***
- **Technical Assistance***
- **Project Activity***
- **Combined Report***
- **Time Tracker***
- **Resource Manager**
- **Custom Forms**
- **Training/Events**
- **Donor Management**

- **Email Marketing:** This will display the name and a hyperlink to whatever email marketing platform is connected to your CM Site.
- **Case Manager:** This ad-on module tracks legal case management performed by volunteers or staff at your organization. Contact CM Support for a quote to turn on this Module.
- **Payment Processor:** This will display the name and hyperlink to whatever payment processing platform is connected to your CM SIte.
- **Merit:** This ad-on module gives CM users access to a training library of over 250 a-synchronous courses developed by the Nonprofit Center. Any user in CM can view the course offerings and register for a course. CM will track the attendance data. Contact CM Support for a quote to turn on this Module.
- **Lending Library:** This ad-on module tracks the lending of physical resources (i.e. books, tools, DVDs) and sends auto-reminders to the borrower and your staff. Contact CM Support for a quote to turn on this Module.