CE Portal

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The Continuing Education Portal allows an attendee to find and book courses they are interested in attending, review past courses and credits earned, and update their contact details.

Setting up the CE Portal App

Details

As for all apps/portals, you need to set up a name, Alias (URL), brand, live dates, and messaging for before and after the app is live. **Read this article for more information.**

Content Tab

Change the navigation links, menu text, page content and text labels for the following portal pages:

- **Home Page**
- **Search Page** – also includes:
  - **Classification Types available in Advanced Search** – the Advanced Search will let you search on Classifications and Sub-Classifications, but only for the Classification Types you select here
  - **Number of results per page** – search will return 10 results per page by default, you can adjust that here
- **Shopping Cart Page** – also includes:
  - **Number of Suggested Courses to show** – by default, this list will show 10 Suggested Courses
  - **Payment Interactive Site** – choose the existing Interactive Site that will be used for Payments
  - **Confirmation Email Merge Doc** – choose the Merge Doc that will be used for Confirmation Emails
  - **Enable CE Discount Codes Check Box** – select this check box if you wish to offer CE Discount Codes to your students
  - **Enable Waitlist** – if an item's inventory level is getting low, you can choose to put further bookings on the Waitlist. Then, one of your staff can later use the Waitlist Management Express Action to manually choose which people on the Waitlist should receive tickets. To learn more about Waitlists, see our article on Waitlist Management.
- **Calendar Page** – lets you define default headings and labels. You also are able to allow course registrations to

occur after the course has started.

- **Sign–in Page** – also includes:
  - **New Account Interactive Site** – choose the existing Interactive Site that will be used to create a New Account.
- **Update Details Page** – also includes:
  - **Update Details Interactive Site** – choose the existing Interactive Site that will be used to Update Details.
- **Current Schedule Page**
- **History Page**
- **Credits Page** – also includes:
  - **Module** – this field narrows down the list of reports for the next setting, **Certificate Report**.
  - **Certificate Report** – choose any report to print under **Certificate** on the Credits Page.
- **Course Detail Popup**
- **Generic Buttons and Labels**

Using the CE Portal App

Home

Read the Welcome message, and review any special instructions here from the organizer.

Search

Find courses by date, keywords, or classification.

- **Keyword Search** – enter any word that appears in the Course Name or Overview.
- **Course Date** – enter the From Date and/or the To Date of the course.
- **Instructor** – enter any part of the Instructor's name to find all matching courses.
- **Classifications** – press Advanced Search to reveal Classifications.

Press Search to see your Results.

You can purchase a Course from here by checking the checkbox next to each Course you want to attend, and clicking **Add To Cart**.

Calendar

- **Keyword Search** – enter any part of the Course Name or Overview
- **Classifications** – press Advanced Search to reveal Classifications.

Press Search to see your Results in the Calendar.

Press **List View** or **Calendar View** to toggle between the view types.

Shopping Cart

Any courses previously selected by pressing **Add To Cart** in the **Search** screen will appear here.

Also, you will see a list of **Suggested Courses**, drawn from courses that have similarities to courses you have already added to the Cart, from looking at their Master Course Code, Classification, Sub-Classification, and Classification Type.

Press Checkout to begin the purchase process.

Update Details

Update your contact details here. The fields you can update depend on which Interactive Site was chosen in the Update Details setup page.

Current Schedule

Shows the future courses you currently have booked.

History

Shows all completed courses, and any Certificates earned.

Credits

Shows all CE Course Credits earned for all courses attended.

Sign in / Sign off

Enter your email and password to sign in to the portal. You can also create a new account from here.

Press Sign off when you are finished.