Course

Course Details

Define both internal and external CE Courses here.

Finding Your Course

You may have hundreds, or even thousands of courses set up in the CE module - how can you quickly locate the ones you want?

Whenever you see "*Search to select a course*", press the **Search** button. Enter into the search box any detail about the course - it will then search the Course Name, Unique Code, Master Course Code, and Series Code, and return any courses that contain your search term in any of these fields. You do not need to type in the complete code or name; typing in a part of it will return all matching courses.

Check the boxes next to the courses you want, and click **Open**. All selected courses will now appear in the left-hand panel, for easy selection.

> **Tip**: If you are not getting the results you expect, check the Course Dates in the Search window; these are part of your search criteria.

Setting Up a New Course

The information you can specify includes:

- **Unique Code** - a required code to identify this course.
- **Valid Payment Status** - the default payment statuses are Purchase, Inclusive, Complimentary, and Canceled. You can also enable additional payment statuses, such as:
    - No Charge
    - Own Expense
    - Invited
    - Not Attending
    - Not Required
    - Deposit
    - Charge to Another Contact
    - Waitlist Purchase
    - Waitlist No Payment Required
- **Name** - also required, this is the name of the course that students will see.
- **External Course** - this is a course run by another institution. If you check this, the input fields will change, and you can no longer control the settings for Inventory, Alerts, Room Setup, Confirmation Merge Doc, etc.
- **Inventory Limit** - Unlimited, or Limited to a specific number.
- **Minimum Attendance** - lets you specify the minimum attendance allowed for this course.
- **Optional Alert** - checking this option will send an alert once the inventory level drops below the pre-set limit.
    - **Limit** - sets the percentage of remaining inventory items to trigger an alert.
    - **Alert Level** - set the alert level that you wish to send. A critical or high alert will also trigger alert indicators on the navigation bar and the event selection screen.

- **Start and End Dates and Times** - specify the start and end dates and times for the course.
- **Master Course Code** - the course on which this course is based, if any. This may be an internal reference, and does not need to be set up within EventsAir.
- **Series Code** - record if this course is part of a series. This may be an internal reference, and does not need to be set up within EventsAir.
- **Status** - lets you designate the current status of this course:
    - Open
    - Closed
    - Tentative
    - Postponed
    - Canceled
- **Location** - select from a list of pre-defined Course Locations.
- **Room Setup** - record any notes about how the room should be configured - seating, A/V, etc.
- **Food & Beverage** - keep notes on required catering for the session.
- **External Registration URL** - lets you enter the URL for an EventsAir Interactive Site. You are also able to add the Auto Login Token, allowing the registration to be pre-populated with the student's contact details.
- **External Website URL** - the website where students can register for the course. (Not required if you are handling registrations yourself, through EventsAir.)
- **Confirmation Merge Docs** - the name of a merge document created specifically to confirm registration for a course. (With Merge Fields you can create a single Merge Doc that can handle confirmation for ALL your different courses!)
- **Course Certificate** - choose a report layout for the certificate that will be sent to the attendee upon completion of the course.
- **Credits** - lets you specify the number of hours this course earns, and whether they are Continuing Education Units (CEU) or Credit Hours. Press Add Credit, select a pre-defined Credit Type from the drop-down list, and type in the number of Credits.

Payment Policy Tab

If enabled in the Payment and Cancelation section of CE Course setup, a Payment Policy tab will be visible.

Click this link to read more about setting up global CE Course Payment Policies, and Terms and Conditions.

Here in the CE Course Type setup, you can choose to either use the **Default Payment Schedule** (from CE Course Payment Policies), or define a **Custom Payment Schedule**, just for this one CE Course Type.

Cancelation Policy Tab

If enabled in the Payment and Cancelation section of CE Course setup, a Cancelation Policy tab will be visible.

Click this link to read more about setting up global CE Course Cancelation Policies, and Terms and Conditions.

Here in the CE Course Type setup, you can choose to either use the **Default Cancelation Schedule** (from CE Course Cancelation Policies), or define a **Custom Cancelation Schedule**, just for this one CE Course Type.

Advanced Button

Optionally, under the Advanced Button, you can select to record grades and/or scores for this course.