

# Creating a Class

13 Steps [View most recent version](#) 

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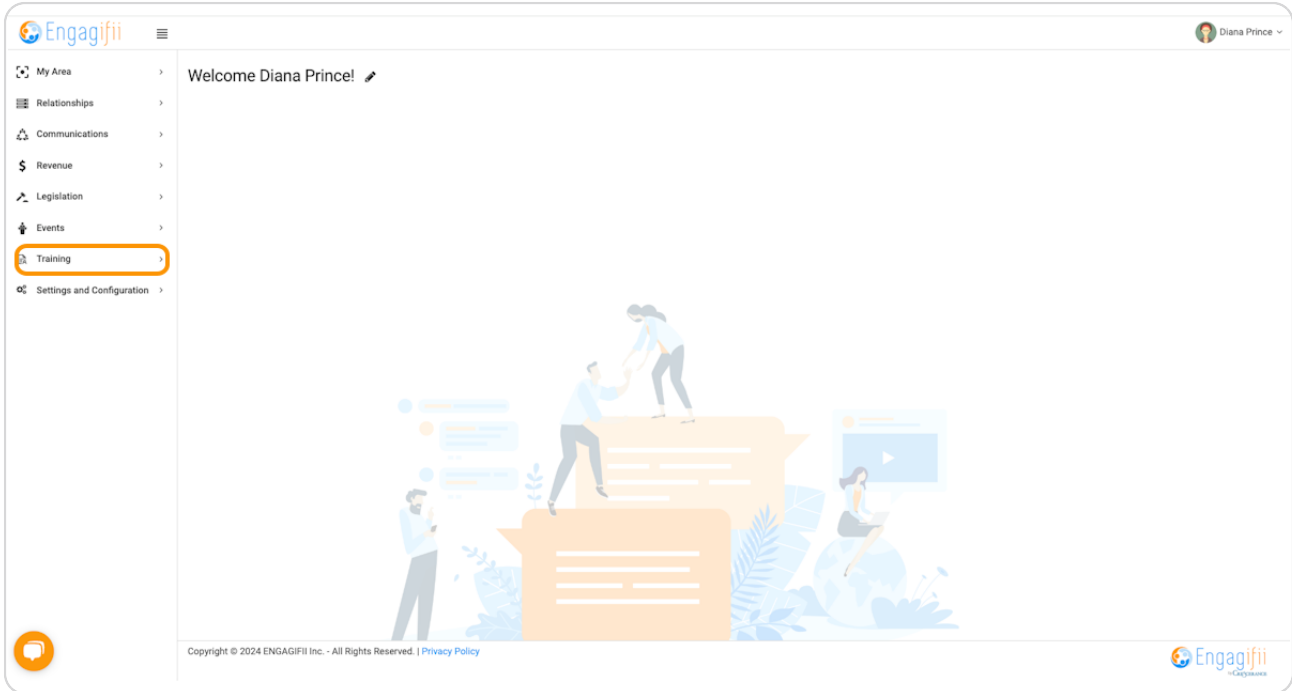
Created by  
Engagifii Inc.

Creation Date  
Dec 03, 2024

Last Updated  
Dec 23, 2024

## STEP 1

### Click on Training to enter the Accreditation Module



## STEP 2

### Click on Classes

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Home / Training / Classes

All Classes Add Class Show Upcoming Classes Page 1/1 10 of 2 Records

Favorites	Search Classes	Search Event	Duration	Class Type	Class dates	Instructors	Attendees	Register
★	New Member Orientation New Class 28 MAY 2024 at 3:00 AM - 3:00 PM	-	1 Day	Basic Members...				Register
★	New Member Orientation New Member Orientation 28 NOV 2024 at 10:00 AM - 4:00 PM	2 Events	1 Day	Basic Members...				Register

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## STEP 3

### Click on Add Class

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Home / Training / Classes

All Classes Add Class Show Upcoming Classes Page 1/1 10 of 2 Records

Favorites	Search Classes	Search Event	Duration	Class Type	Class dates	Instructors	Attendees	Register
★	New Member Orientation New Class 28 MAY 2024 at 3:00 AM - 3:00 PM	-	1 Day	Basic Members...				Register
★	New Member Orientation New Member Orientation 28 NOV 2024 at 10:00 AM - 4:00 PM	2 Events	1 Day	Basic Members...				Register

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## STEP 4

Add the Course Name, Class Type, Class Name, and all of the other fields to set up your class. Please note, anything with a red asterisk is a mandatory field. Once finished, select Save.

Home / Training / Classes

All Classes Show Upcoming Classes Page 1/1 10 of 2 Records

Courses \*

Course Metrics : 10 Credit Hours

Class Type \*

Class Name \*

Single-day Class  On-demand Class

Start Date  Start Time  :  PM End Time  :  PM

Occurs once on Jan 16 2025 at 02:00 PM - 05:00 PM

Tag(s):

Close Save

## STEP 5

Click on the class name to configure the details and set up registration.

Engagifii Diana Prince

Home / Training / Classes

All Classes Add Class Show Upcoming Classes Page 1/1 10 of 2 Records

Favorites	Search Classes	Search Event	Duration	Class Type	Class dates	Instructors	Attendees	Register
*	<span>New Course</span>		2 Days	Basic Members...	16 JAN 2025 - 17 JAN 2025			<span>Register</span> <small>Registration Not Setup</small>

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## STEP 6

### Click on Edit

& Pricing   Accounting Details

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## STEP 7

By clicking this icon, you can set the visibility of the course and determine who is able to see it

★ New Course

New Class Course

Not Setup 🔴 Registrations

Tag(s): +

General   Related Classes   Pricing & Registration Details

Class Schedule

Single-day Class

Start Date

01/16/2025

Occurs once on Jan 16 2025 at

Publishing to 0 Tag(s), 0 Person, 0 Role(s), and 1 Organization(s)

This class requires registration

Allow registrants with "Pending" status to count toward total registrations

**Publish New Class Course**

Publish to: Specific People

Publishing to Specific People will make this object visible to all the people, tags & user roles belonging to Customer Onboarding.

People   Tags   Organizations   User Roles

Search People

Cancel   **Publish**   Unpublish

## STEP 8

In the **General Tab**, toggle on **This Class Requires Registration** to configure the registration dates/times, and default pricing. You will also see the basic registration workflow steps listed.

The screenshot displays the 'New Course' setup page in the Engagifii system. The 'General' tab is selected, and the 'This class requires registration' toggle is turned on. The registration details section includes a registration limit of 0, a registration start date of 12/23/2024, and a default price of \$0.00. The default registration workflow is shown as a sequence of seven steps: Overview, Choose Participants, Confirms/Update User Information, Select Classes, Review & Submit, Payment, and Status.

**Course Information:**

- Course Name: New Course
- Registration Status: Not Setup (Registration Not Setup)
- Participation: 0 / 0

**Class Schedule:**

- Class Type: Single-day Class
- Start Date: 01/16/2025
- Start Time: 2:00 PM
- End Time: 5:00 PM
- Occurs once on Jan 16 2025 at 02:00 PM - 05:00 PM

**Pricing & Registration Details:**

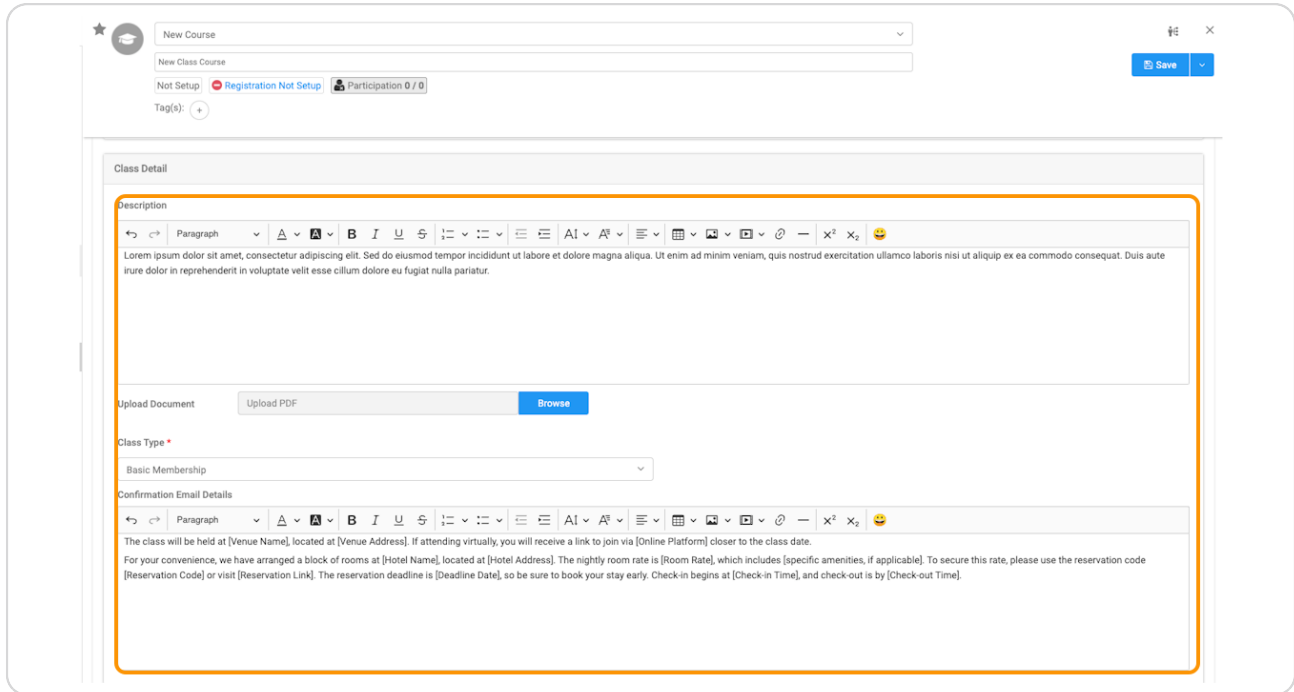
- This class requires registration
- Allow registrants with "Pending" status to count toward total registrations
- Registration Limit: 0
- Registration Start on: 12/23/2024
- Start Time: 00:00 AM
- End Date: MM/DD/YYYY
- End Time: 00:00 AM
- Default Price for All: \$0.00

**Default Registration Workflow:**

- 1 Overview
- 2 Choose Participants
- 3 Confirms/Update User Information
- 4 Select Classes
- 5 Review & Submit
- 6 Payment
- 7 Status

## STEP 9

Scrolling down, you can add a class description in the text editor box. You can also upload a document or agenda. And you have the ability to add class confirmation email descriptions if you need to provide information once the registration has been completed.



New Course

New Class Course

Not Setup Registration Not Setup Participation 0 / 0

Tag(s):

**Class Detail**

**Description**

Paragraph

Paragraph

Upload Document

Upload PDF Browse

**Class Type**

Basic Membership

**Confirmation Email Details**

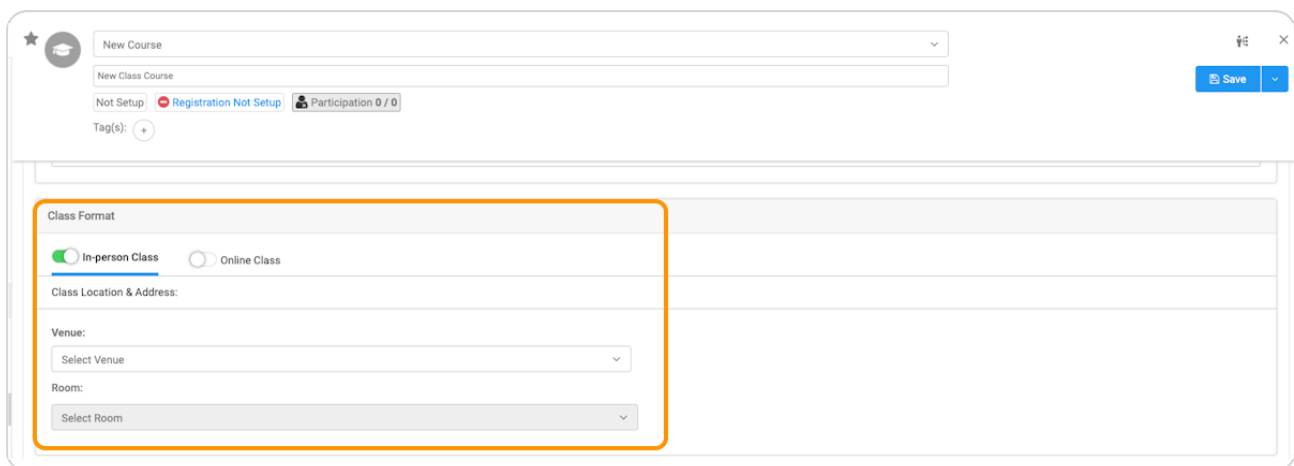
Paragraph

The class will be held at [Venue Name], located at [Venue Address]. If attending virtually, you will receive a link to join via [Online Platform] closer to the class date.

For your convenience, we have arranged a block of rooms at [Hotel Name], located at [Hotel Address]. The nightly room rate is [Room Rate], which includes [specific amenities, if applicable]. To secure this rate, please use the reservation code [Reservation Code] or visit [Reservation Link]. The reservation deadline is [Deadline Date], so be sure to book your stay early. Check-in begins at [Check-in Time], and check-out is by [Check-out Time].

## STEP 10

Scroll down and toggle on In-Person Class and location details



New Course

New Class Course

Not Setup Registration Not Setup Participation 0 / 0

Tag(s):

**Class Format**

In-person Class  Online Class

**Class Location & Address:**

Venue:

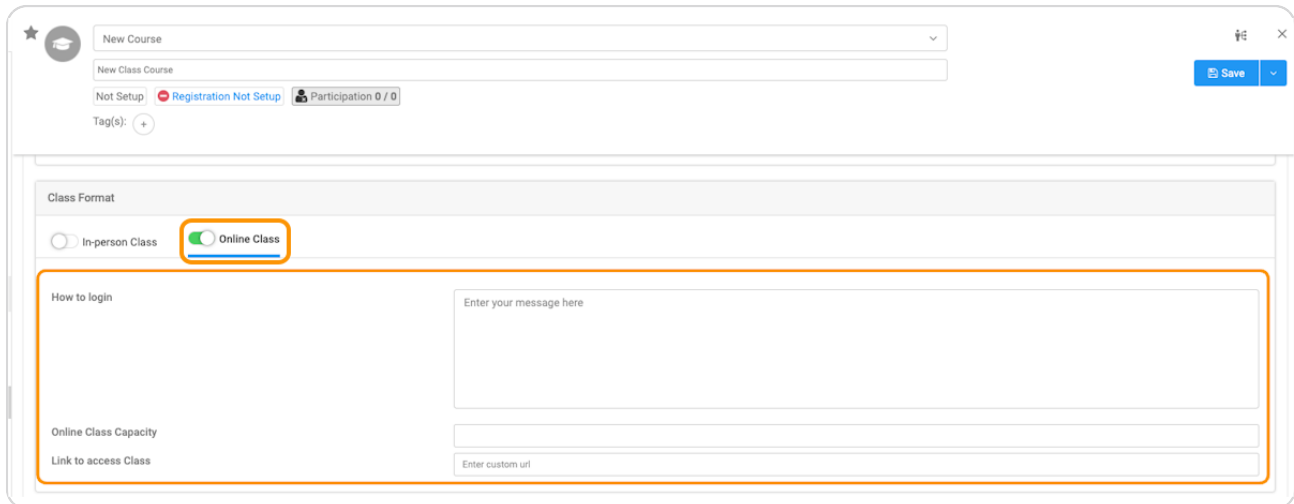
Select Venue

Room:

Select Room

## STEP 11

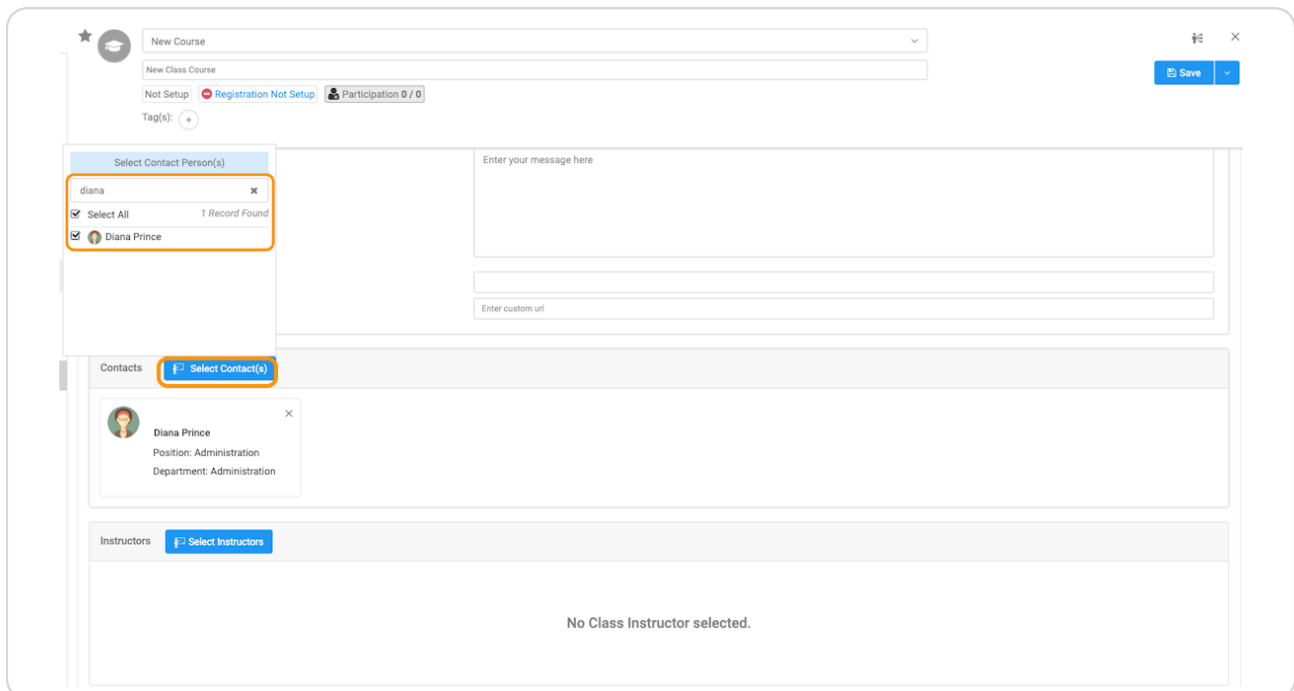
Or toggle on Online Class and add login details



The screenshot shows the 'New Course' setup interface. At the top, there are fields for 'New Course' and 'New Class Course', along with a 'Save' button. Below these are status indicators: 'Not Setup', 'Registration Not Setup', and 'Participation 0 / 0'. A 'Tag(s):' field is also present. The 'Class Format' section has two radio buttons: 'In-person Class' and 'Online Class'. The 'Online Class' option is selected and highlighted with an orange box. Below this, there are three input fields: 'How to login' (with a text area for 'Enter your message here'), 'Online Class Capacity', and 'Link to access Class' (with a text area for 'Enter custom url').

## STEP 12

Click the Select Contacts button and begin typing the name of the contact person and check the box to add them. Follow the same process to add the Instructor.

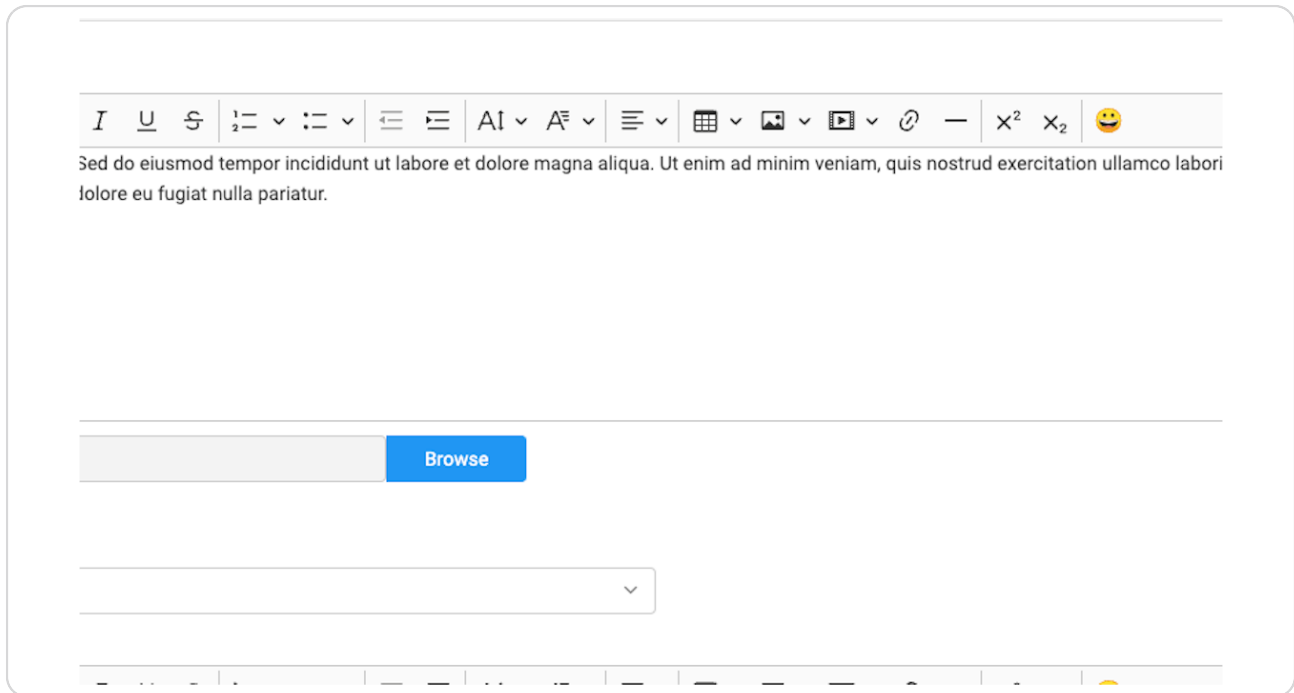


The screenshot shows the 'New Course' setup interface with the 'Select Contact Person(s)' dropdown menu open. The dropdown lists 'diana' with an 'x' icon, 'Select All' with a checkmark and '1 Record Found', and 'Diana Prince' with a checkmark and a profile icon. The 'Select Contact(s)' button is highlighted with an orange box. Below the dropdown, the 'Contacts' section shows a card for 'Diana Prince' with her position and department. The 'Instructors' section has a 'Select Instructors' button and a message: 'No Class Instructor selected.'



## STEP 13

### Once finished, select Save



The screenshot displays a rich text editor interface. At the top, there is a toolbar with various icons for text formatting (bold, italic, underline, strikethrough), alignment (left, center, right, justified), font color, background color, bulleted list, numbered list, link, unlink, insert table, insert image, insert video, and an emoji icon. Below the toolbar, there is a text area containing the placeholder text: "Sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco labori lolore eu fugiat nulla pariatur." Below the text area, there is a horizontal bar with a "Browse" button. Below the "Browse" button, there is a dropdown menu with a downward arrow. At the bottom of the editor, there is a status bar with various icons.

