

Class Registration and Pricing

64 Steps [View most recent version](#) 

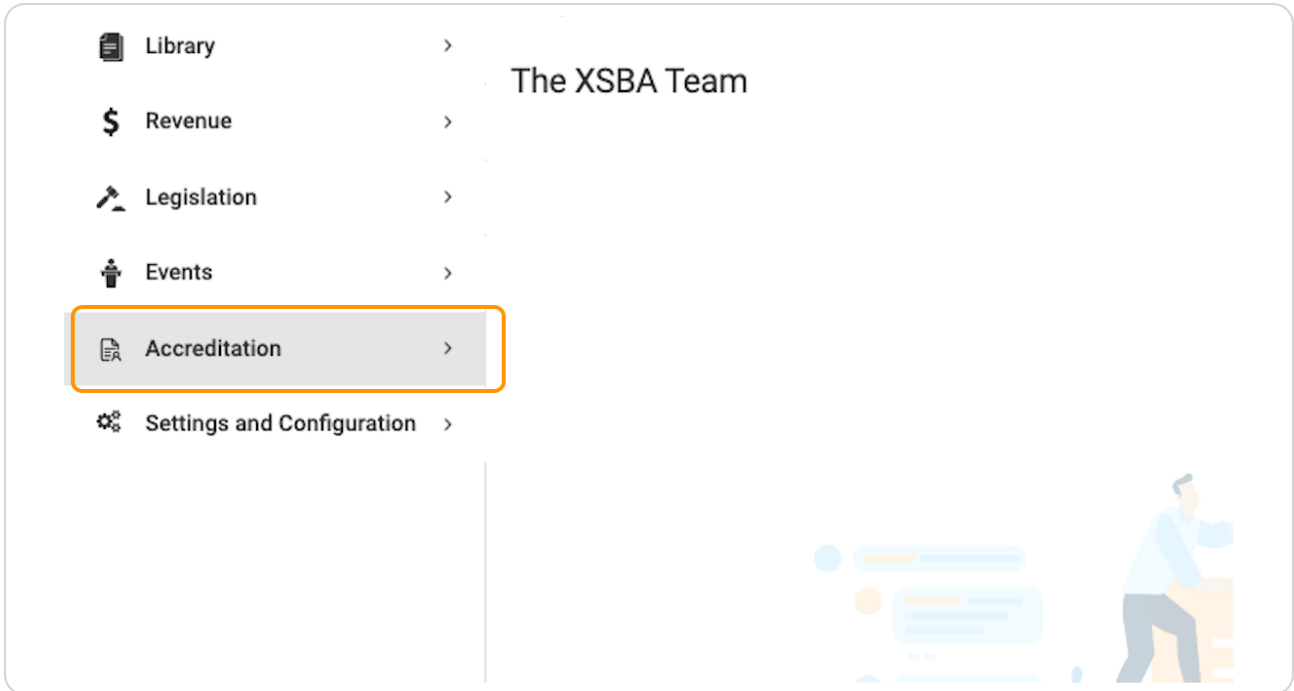
Created by
Engagifii Inc.

Creation Date
October 23, 2023

Last Updated
October 23, 2023

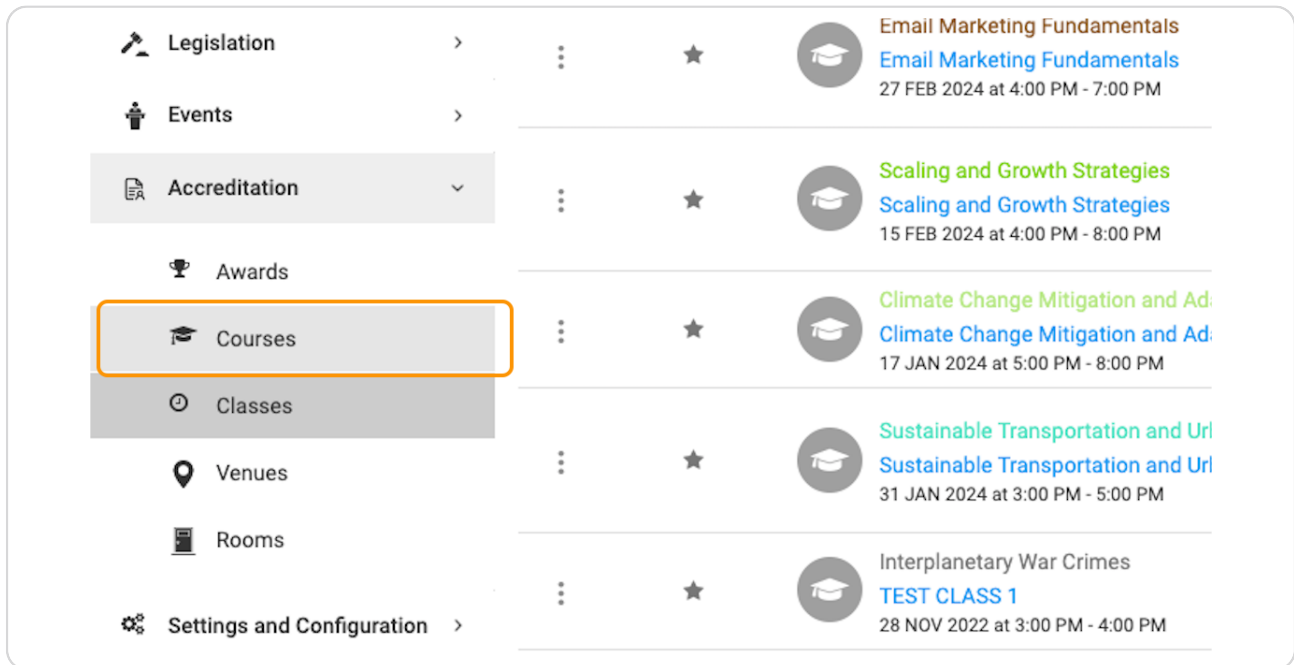
STEP 1

Click on Accreditation



STEP 2

Click on Courses

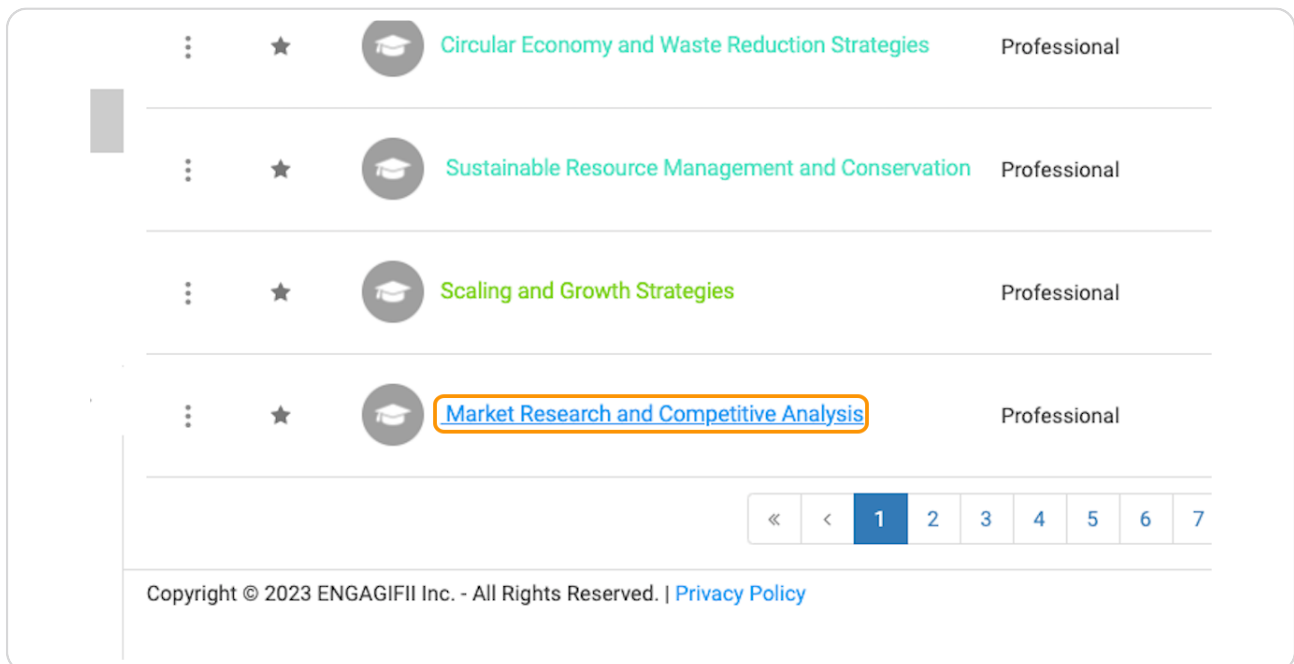


The screenshot shows a navigation menu on the left and a list of course cards on the right. The 'Courses' menu item is highlighted with an orange border. The course cards are as follows:

Course Title	Date and Time
Email Marketing Fundamentals	27 FEB 2024 at 4:00 PM - 7:00 PM
Scaling and Growth Strategies	15 FEB 2024 at 4:00 PM - 8:00 PM
Climate Change Mitigation and Ad	17 JAN 2024 at 5:00 PM - 8:00 PM
Sustainable Transportation and Url	31 JAN 2024 at 3:00 PM - 5:00 PM
Interplanetary War Crimes	28 NOV 2022 at 3:00 PM - 4:00 PM

STEP 3

Choose the course you would like to add a class for.



The screenshot shows a list of four courses, each with a star icon, a graduation cap icon, and a level indicator. The course 'Market Research and Competitive Analysis' is highlighted with an orange border. Below the list is a pagination control showing page 1 of 7.

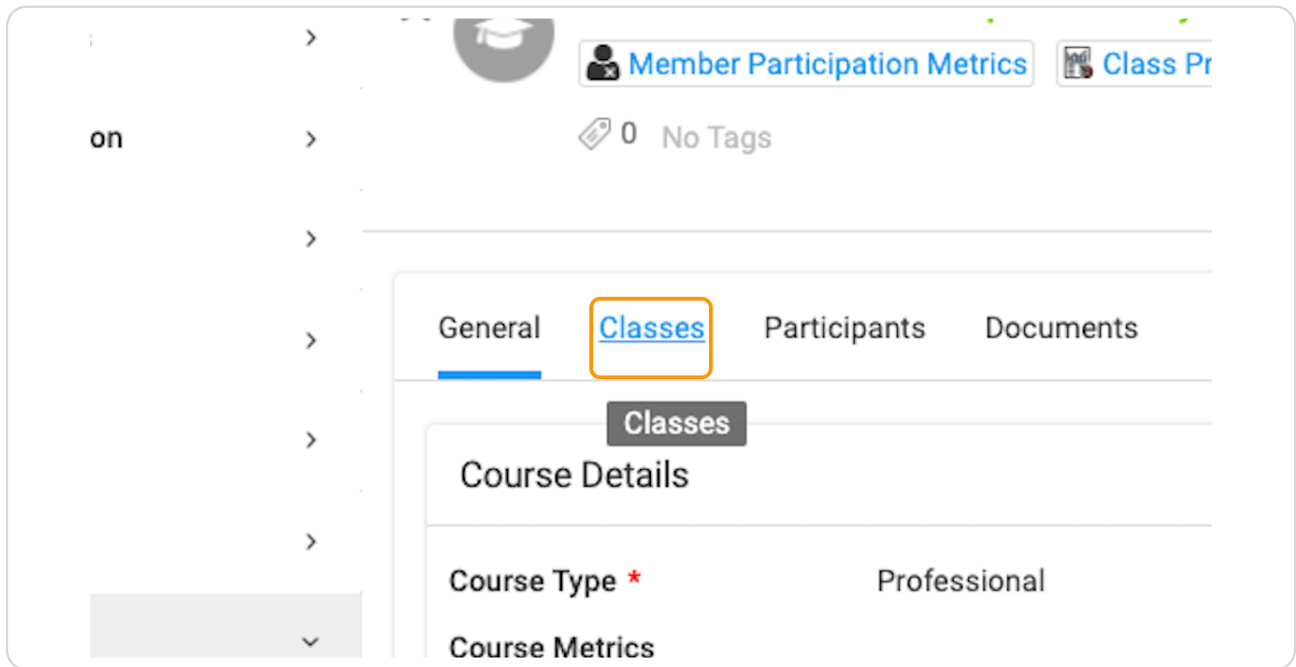
Course Title	Level
Circular Economy and Waste Reduction Strategies	Professional
Sustainable Resource Management and Conservation	Professional
Scaling and Growth Strategies	Professional
Market Research and Competitive Analysis	Professional

« < 1 2 3 4 5 6 7 »

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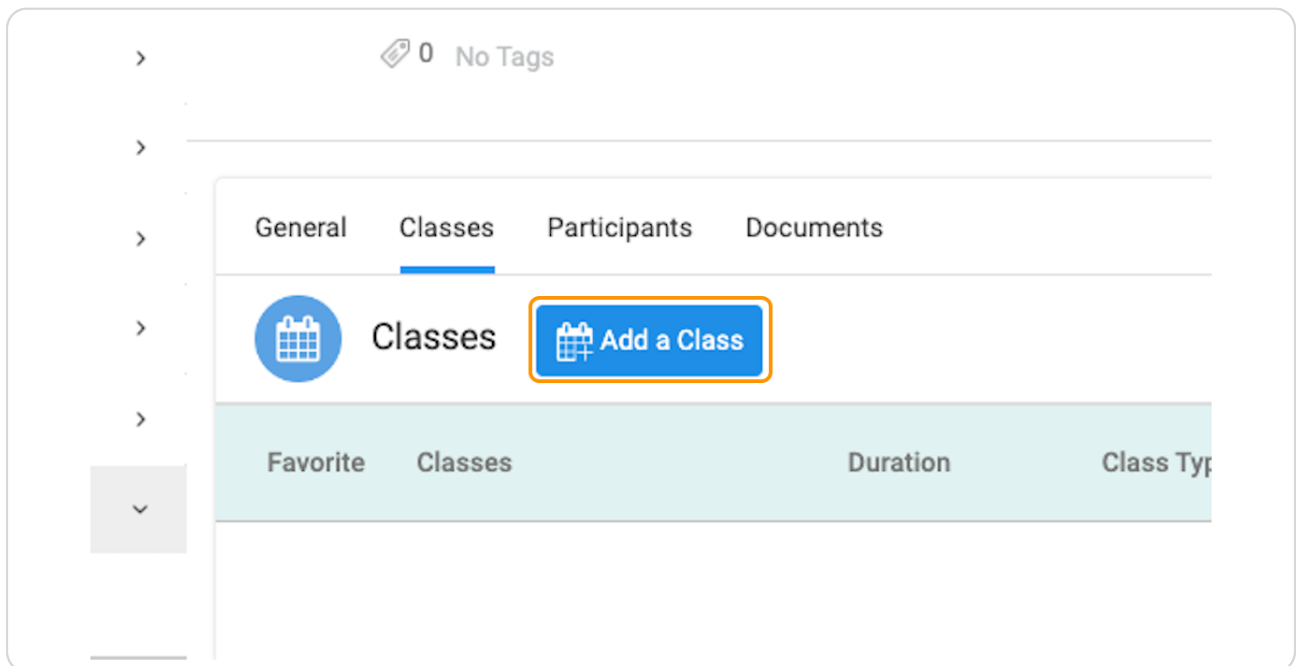
STEP 4

Click on Classes



STEP 5

Click on Add a Class



STEP 6

Click on Select a Class Type

The screenshot shows the 'Classes' form in the Xba system. The 'Class Type' dropdown menu is highlighted with an orange border, showing the option 'Select a Class Type'. The form includes fields for Course, Class Name, Start Date, Start Time, and End Time.

Course: Market Research and Competitive Analysis

Class Type: Select a Class Type

Class Name: Market Research and Competitive Analysis

Single-day Class On-demand Class

Start Date: 10/23/2023 Start Time: 4 : 27 PM End Time: 5 : 27 PM

Occurs once on Oct 23 2023 at 04:27 PM - 05:27 PM

STEP 7

Click on Select Class Type...

The screenshot shows the 'Classes' form in the Xba system. The 'Class Type' dropdown menu is open, showing a list of options including Professional, Core Class, Orientation, General, Ethics, and Event. The 'Professional' option is selected.

Course: Market Research and Competitive Analysis

Class Type: Professional

Class Name: Market Research and Competitive Analysis

Single-day Class On-demand Class

Start Date: 10/23/2023 Start Time: 4 : 27 PM End Time: 5 : 27 PM

Occurs once on Oct 23 2023 at 04:27 PM - 05:27 PM

Class Tag: +



STEP 8

Set the date and time of the class.


Market Research and Competitive Analysis

Single-day Class On-demand Class

Start Date **Start Time**

10/23/2023  4 : 27 PM 

Occurs once on Oct 23 2023 at 04:27 PM - 05:27 PM



Class Tag 

STEP 9


Set the time of the class

Single-day Class On-demand Class

Start Date **Start Time** **End Time**

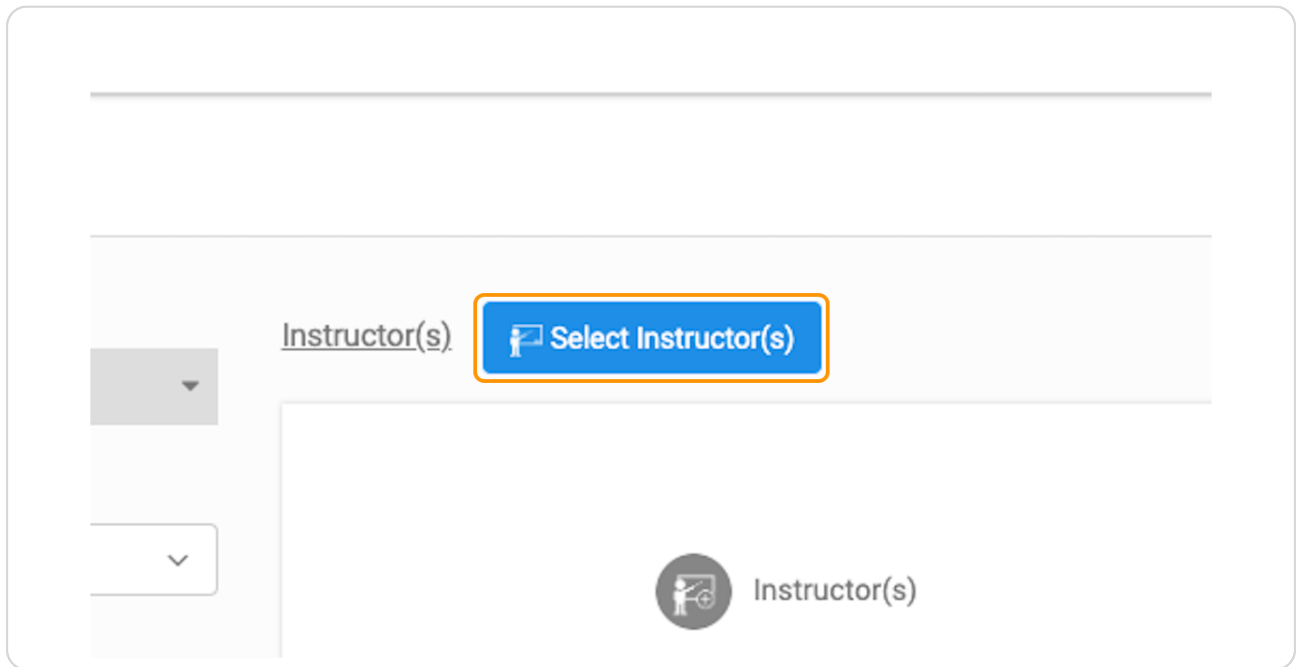
01/12/2024  3 : 00 PM  5 : 27

Occurs once on Jan 12 2024 at 03:27 PM - 05:27 PM

Tag 

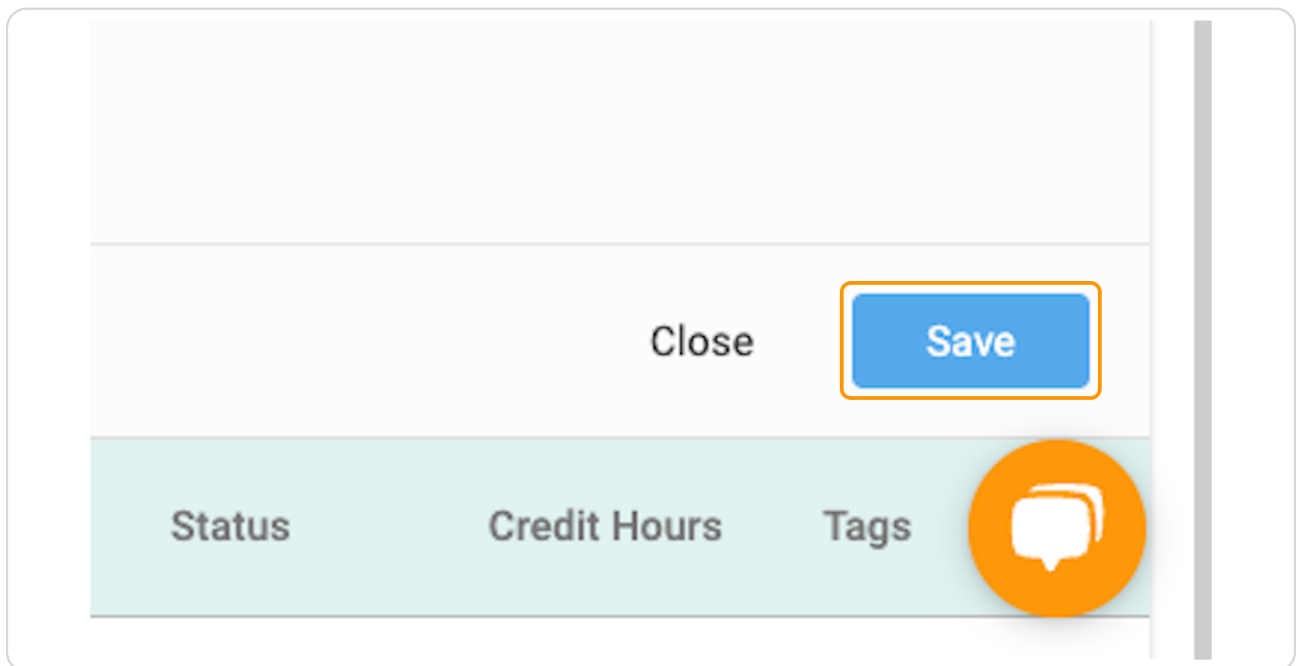
STEP 10

Click on **Select Instructor(s)**



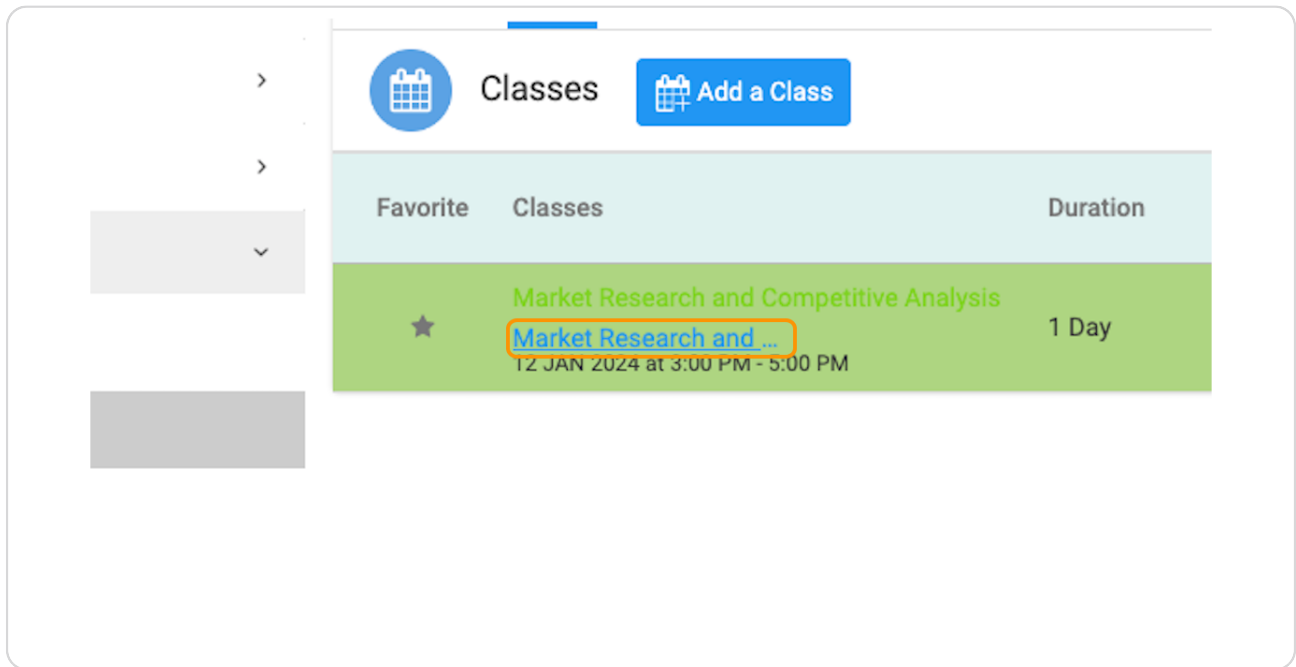
STEP 11

Click on **Save**



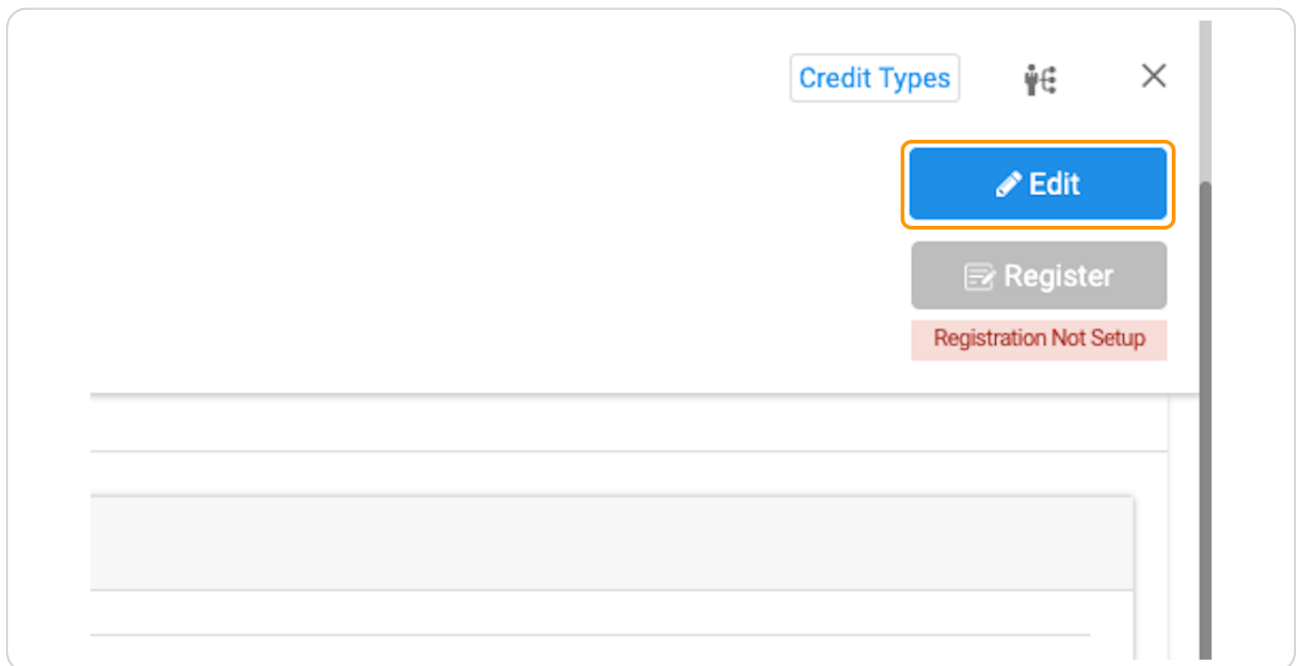
STEP 12

Open the class up.



STEP 13


Click on Edit



STEP 14

Check This class requires registration

- Registration >
- Locations >
- Registration **>**
- Awards
- Courses
- Classes
- Venues
- Rooms

01/12/2024  3 : 00


Occurs once on Jan 12 2024 at 03:00 PM - 05:00 PM

Pricing & Registration Details

This class requires registration

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

Registration Limit ⓘ

Registration Start on  Start Time :

STEP 15


Add a registration limit

- Registration >
- Locations >
- Registration **>**
- Awards
- Courses
- Classes

This class requires registration

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

Registration Limit ⓘ

Registration Start on  Start Time :

Default Price for All

STEP 16

Set your registration period

This screenshot shows the configuration page for a class. On the left is a sidebar with navigation options: Legislation, Lists, Education, Awards, Courses, Classes, Venues, Rooms, and Settings and Configuration. The main content area is titled 'Class Detail' and contains the following settings:

- This class requires registration
- Allow registrants with "Pending" status to count toward total registrations
- Registration Limit: 150
- Registration Start on: 10/23/2023 (highlighted with an orange box)
- Start Time: 00 : 00 AM
- Default Price for All: \$0.00

STEP 17

Set your registration period

This screenshot shows the same configuration page as Step 16, but with a calendar pop-up open over the 'Registration Start on' field. The calendar is for October 2023, and the date 10/23 is selected. The main interface shows the following details:

- Course: Market Research and Competitive Analysis
- Status: Not Setup, Registration Not Setup, Participation 0 / 0
- Tag(s): +
- Schedule: Occurs once on Jan 12 2024 at 03:00 PM - 05:00 PM
- Registration Limit: 150
- Registration Start on: 10/23/2023
- Start Time: 00 : 00 AM
- End Date: MM/DD/YYYY
- End Time: 00 : 00 AM

STEP 18

Set your registration period

The screenshot shows the Xba course management interface. The course title is "Market Research and Competitive Analysis". The registration status is "Registration Not Setup" and participation is "0 / 0". The class occurs once on Jan 12 2024 at 03:00 PM - 05:00 PM. The "Pricing & Registration Details" section includes a toggle for "This class requires registration" (checked), a toggle for "Allow registrants with 'Pending' status to count toward total registrations" (unchecked), a "Registration Limit" of 150, and a "Default Price for All" of \$0.00. The "Registration Start on" is 11/01/2023, and the "Start Time" is 9:00 AM. The "End Date" is currently blank, with a calendar dropdown open showing October 2023. The "End Time" is 00:00 AM. The "Class Detail" section includes a "Description" field with a rich text editor.

STEP 19

Choose your class format

The screenshot shows the "Class Format" section of the course management interface. The "Class Format" field is required (marked with a red asterisk). There are two toggle options: "In-person Class" (unchecked) and "Online Class" (checked). Below the toggles is the "Class Location & Address:" field. Further down are the "Venue:" and "Room:" fields, both marked with red asterisks.

STEP 20


Add joining instruction if an online class

TBD

150

Select

No Contact Person selected.



STEP 21


Add the meeting link

TBD

150

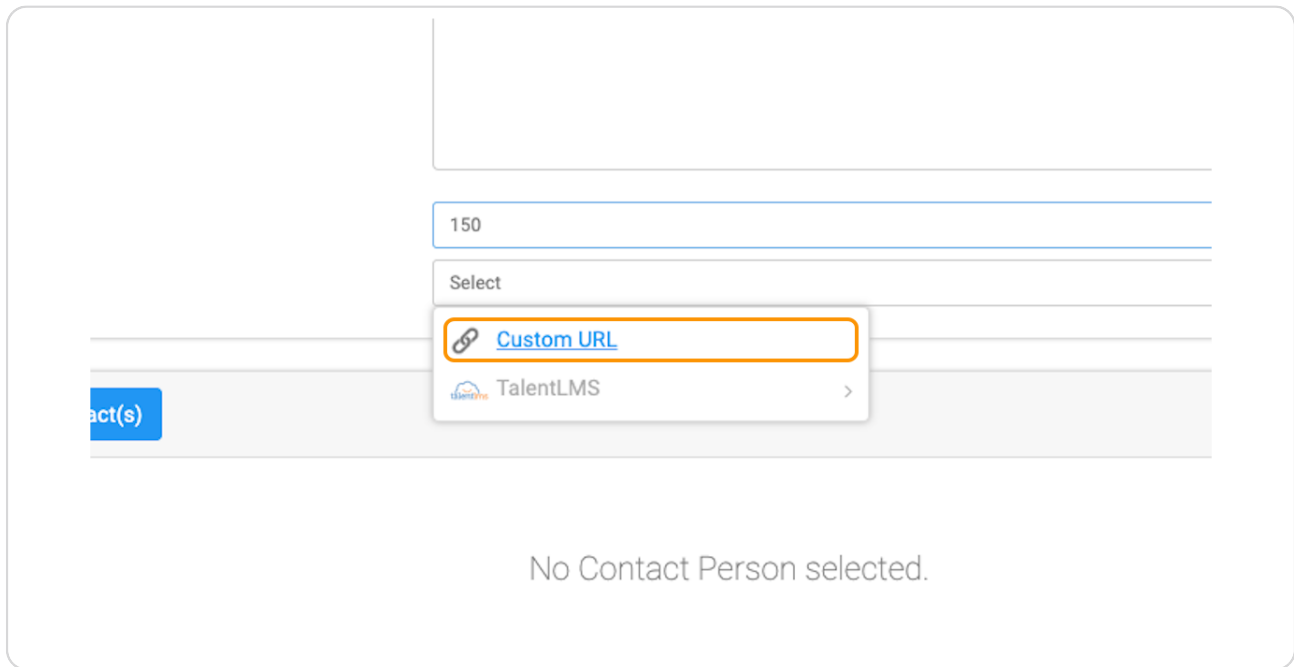
Select

No Contact Person selected.



STEP 22

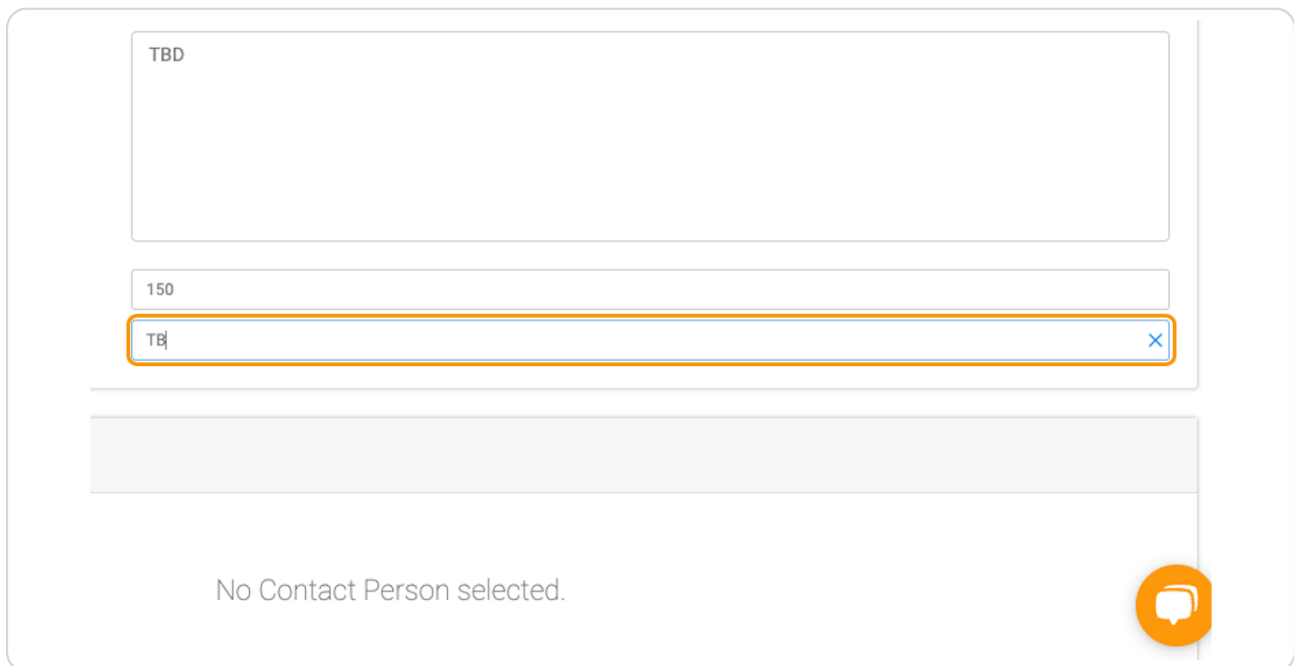
Click on Custom URL



The screenshot shows a form with a dropdown menu. The dropdown is open, showing two options: 'Custom URL' (highlighted with an orange border) and 'TalentLMS'. Below the dropdown, the text 'No Contact Person selected.' is visible. A blue button with the text 'act(s)' is partially visible on the left side of the form.

STEP 23

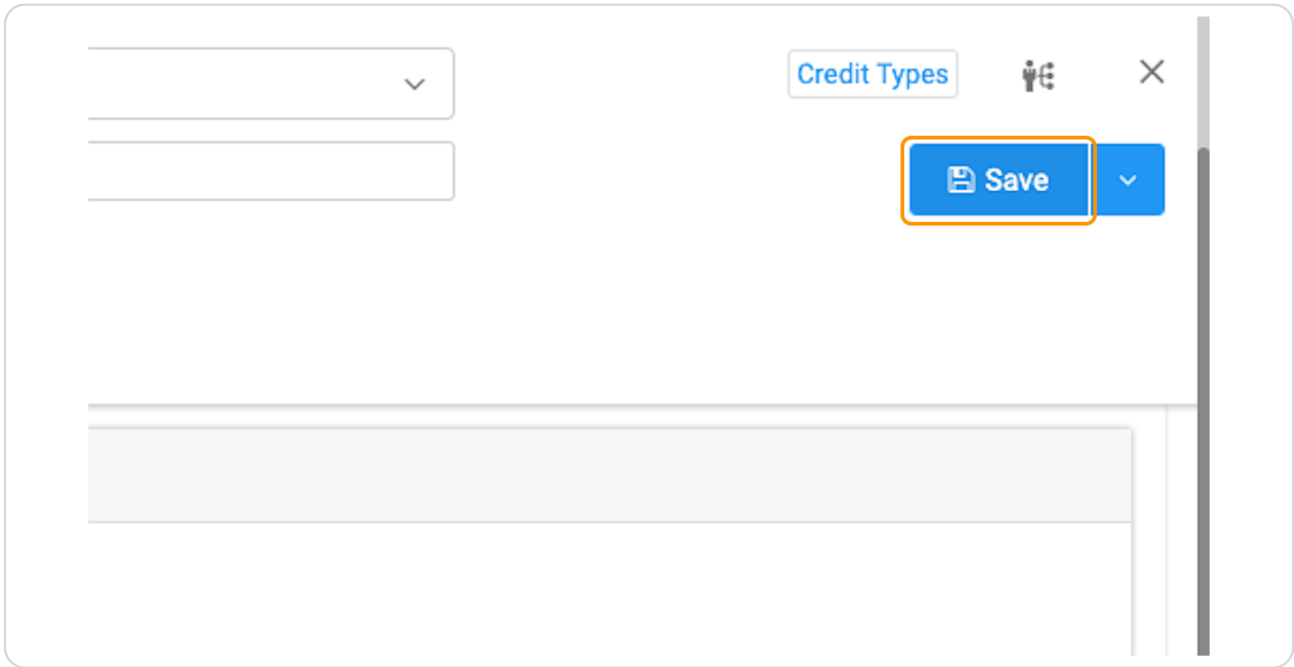
Add the meeting link



The screenshot shows a form with a text input field containing 'TBD'. Below the input field, the text 'No Contact Person selected.' is visible. A blue button with the text 'act(s)' is partially visible on the left side of the form. An orange chat icon is located in the bottom right corner of the form area.

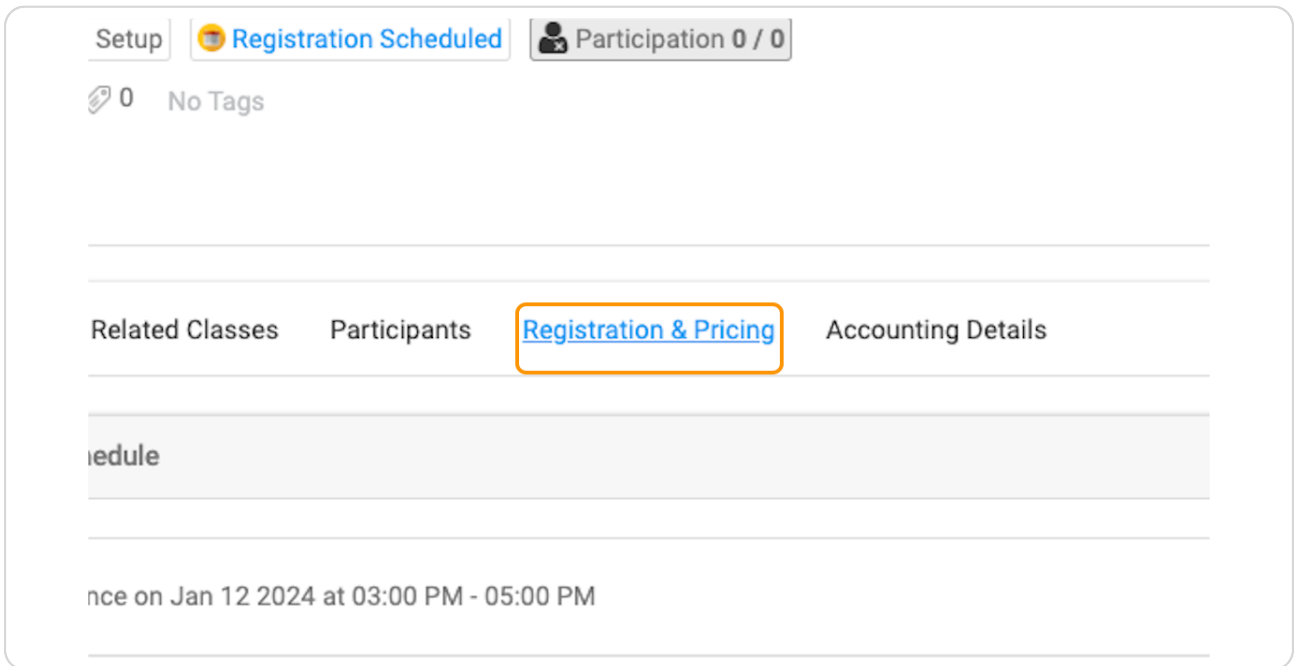
STEP 24

Click on Save



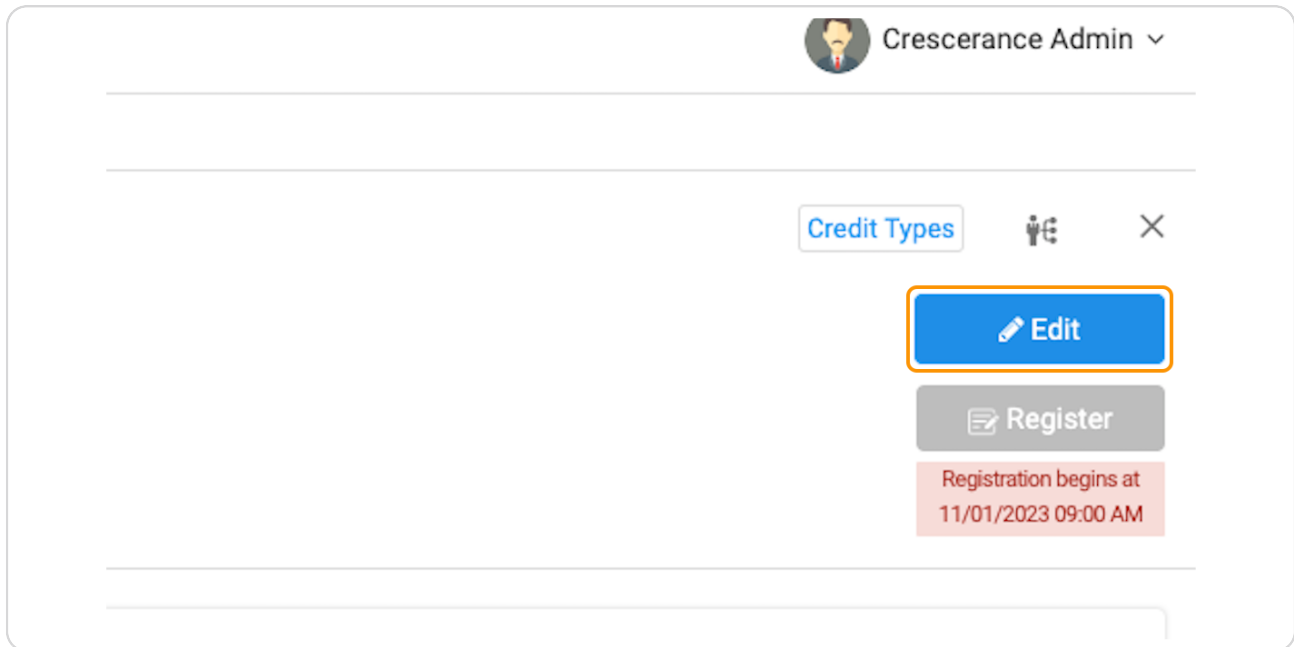
STEP 25

Click on Registration & Pricing



STEP 26

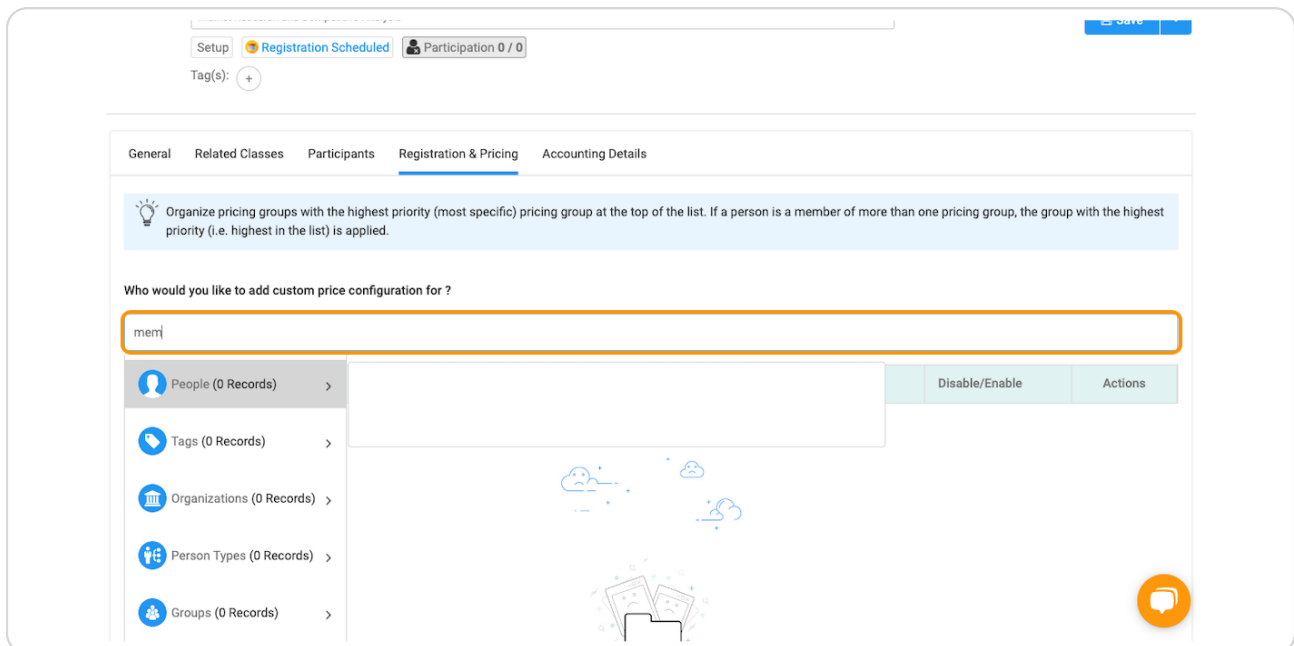
Click on Edit



The screenshot shows the user interface for 'Crescerance Admin'. At the top right, the user's name 'Crescerance Admin' is displayed next to a dropdown arrow. Below this, there is a 'Credit Types' modal window. The modal has a title bar with 'Credit Types', a list icon, and a close 'X' button. Inside the modal, there are three buttons: a blue 'Edit' button with a pencil icon, a grey 'Register' button with a list icon, and a red notification box that says 'Registration begins at 11/01/2023 09:00 AM'. The 'Edit' button is highlighted with an orange border.

STEP 27

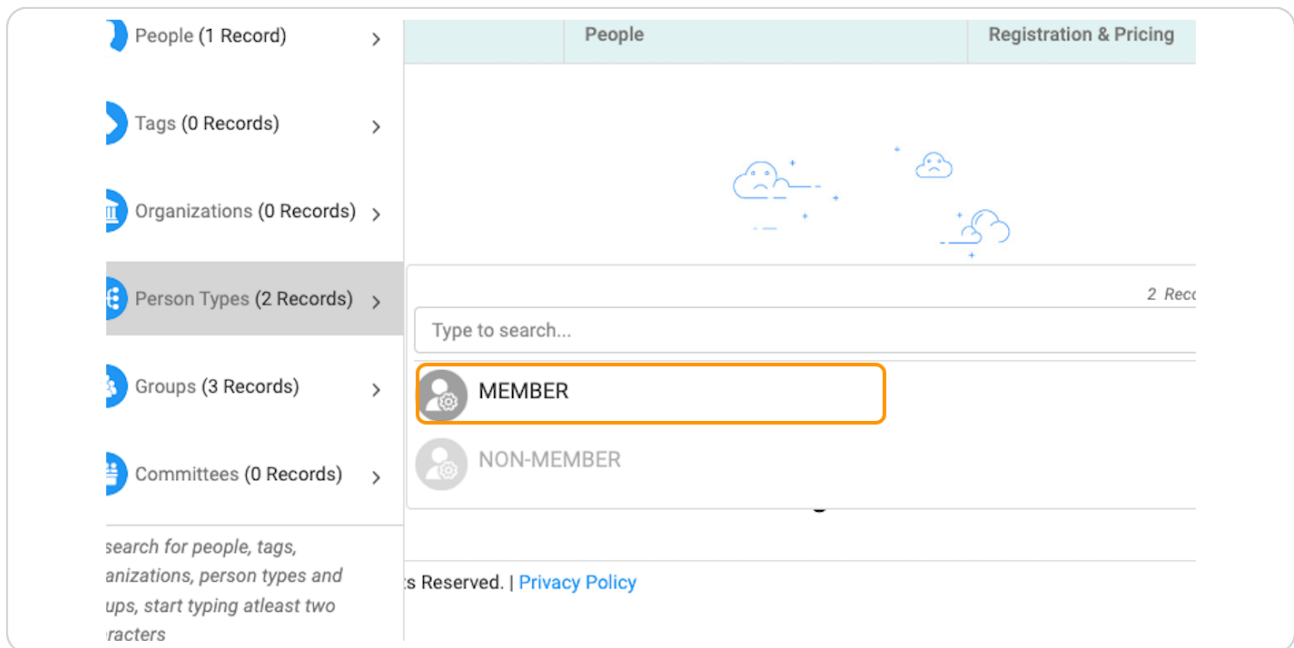
I would like to set special pricing for members so I am searching for the "member" person type.



The screenshot shows the 'Registration & Pricing' tab in the Crescerance Admin interface. At the top, there are tabs for 'Setup', 'Registration Scheduled', and 'Participation 0 / 0'. Below these, there is a 'Tag(s): +' button. The main content area has tabs for 'General', 'Related Classes', 'Participants', 'Registration & Pricing', and 'Accounting Details'. A light blue box contains a lightbulb icon and the text: 'Organize pricing groups with the highest priority (most specific) pricing group at the top of the list. If a person is a member of more than one pricing group, the group with the highest priority (i.e. highest in the list) is applied.' Below this, there is a question: 'Who would you like to add custom price configuration for?'. A search input field contains the text 'mem'. Below the search field, there is a list of categories with '0 Records' next to each: 'People (0 Records)', 'Tags (0 Records)', 'Organizations (0 Records)', 'Person Types (0 Records)', and 'Groups (0 Records)'. To the right of the search results, there are 'Disable/Enable' and 'Actions' buttons. At the bottom right, there is a chat icon.

STEP 28

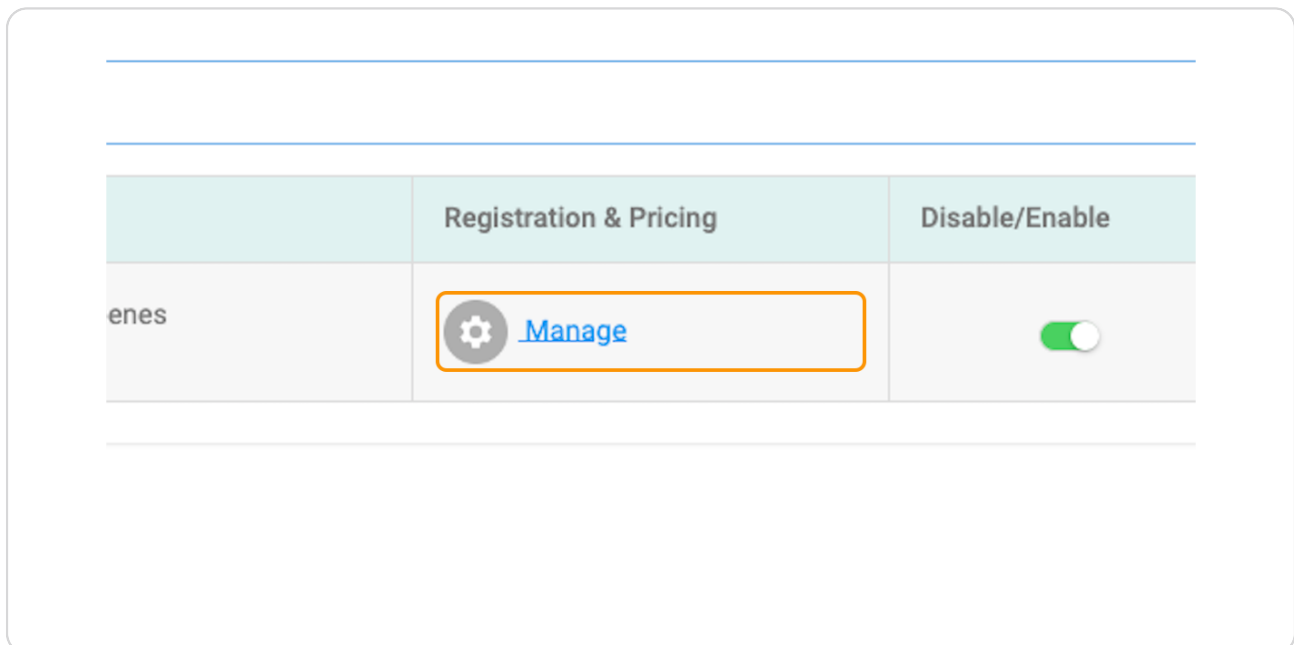
I would like to set special pricing for members so I am searching for the "member" person type.




The screenshot shows a sidebar on the left with navigation items: People (1 Record), Tags (0 Records), Organizations (0 Records), Person Types (2 Records), Groups (3 Records), and Committees (0 Records). The 'Person Types' item is selected. The main content area has a header with 'People' and 'Registration & Pricing' tabs. Below the header is a search bar with the text 'Type to search...'. Two results are shown: 'MEMBER' and 'NON-MEMBER'. The 'MEMBER' result is highlighted with an orange border. At the bottom of the main content area, there is a footer with the text 's Reserved. | Privacy Policy'.

STEP 29

Click on **Manage**



The screenshot shows a table with three columns: 'Registration & Pricing' and 'Disable/Enable'. The first row of the table has a cell with the text 'enes' in the first column, a cell with a gear icon and the text 'Manage' in the 'Registration & Pricing' column, and a cell with a green toggle switch in the 'Disable/Enable' column. The 'Manage' button is highlighted with an orange border.

	Registration & Pricing	Disable/Enable
enes	 Manage	<input checked="" type="checkbox"/>

STEP 30

I would like to set early and regular pricing for my members. I am labeling this "Early Bird"

Library
Revenue
Legislation
Events
Accreditation
Awards
Courses

Default Price
Default Price is \$0.00

Name	Date Range
Early Bird	MM/DD/YYYY

2 Registration Workflow
3 Approval Workflow

STEP 31

Add your Early Bird range.

Default Price
Default Price is \$0.00

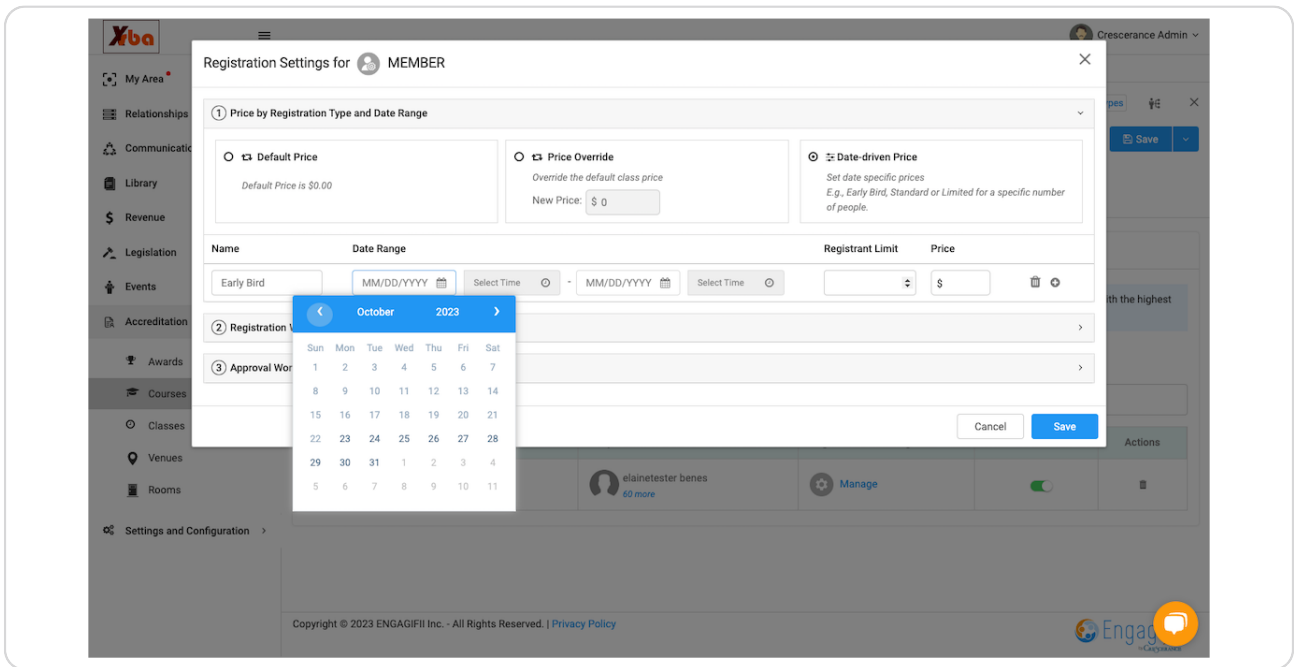
Price Override
Override the default cl
New Price: \$ 0

Name	Date Range
Early Bird	MM/DD/YYYY

2 Registration Workflow
3 Approval Workflow

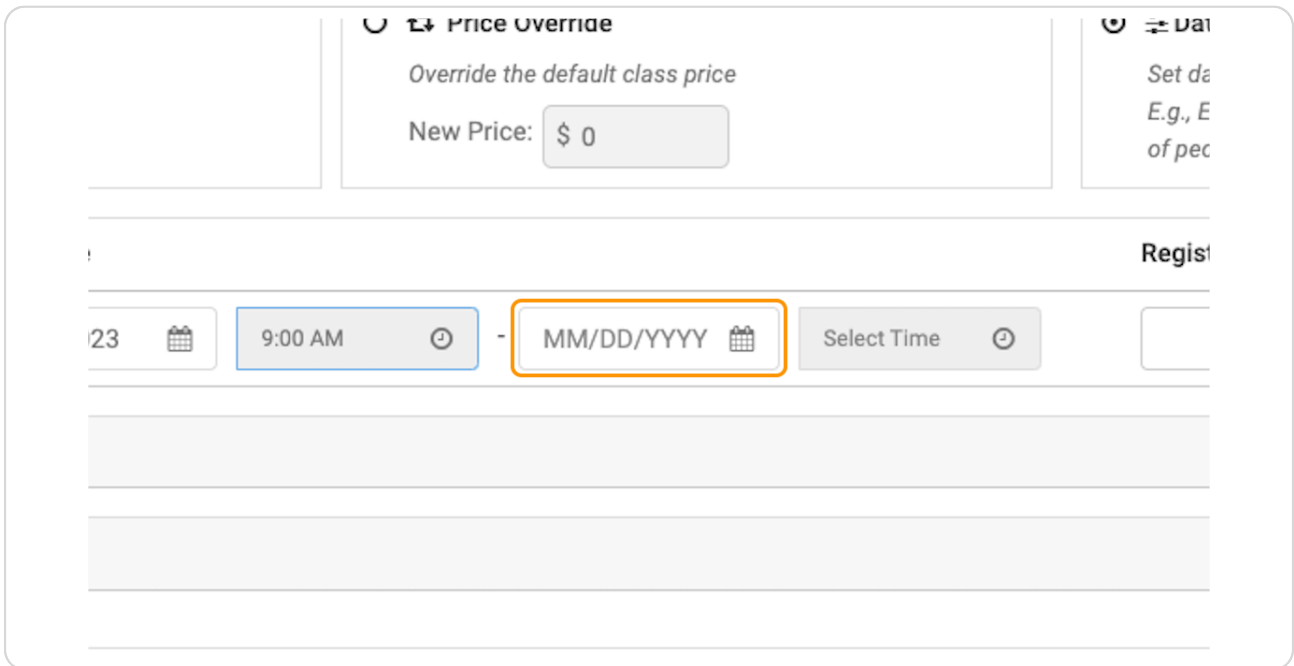
STEP 32

Add your Early Bird range.



STEP 33

Add your Early Bird range.



STEP 34

Be sure your times do not overlap

Price Override
Override the default class price

New Price:

Date-driven Price
Set date specific prices
E.g., Early Bird, Standard or Lim
of people.

	Registrant Limit	Price
<input type="text" value="11/15/2023"/> <input type="text" value="Select Time"/>	<input type="text"/>	<input type="text" value="\$"/>

STEP 35

Click on 9:00 AM

7:00 AM

7:30 AM

8:00 AM

8:30 AM

9:00 AM

elainetester b
60 more

Manage

STEP 36

Type "25"

Set date specific prices
E.g., Early Bird, Standard or Limited for a specific number of people.

	Registrant Limit	Price	
9:00 AM	25	\$	🗑️ +

STEP 37

Set your "Early Bird" price

Set date specific prices
E.g., Early Bird, Standard or Limited for a specific number of people.

	Registrant Limit	Price	
🕒	25	\$ 75	🗑️ +

ith the high

STEP 38

I would like to add the Regular Pricing so I am clicking here to add another pricing rule.

date specific prices
, Early Bird, Standard or Limited for a specific number
people.

Participant Limit	Price
5	\$ 75

with the highest

STEP 39

Type "Regular"

- Revenue
- Legislation
- Events
- Accreditation
- Awards
- Courses
- Classes

Name	Date Range
Early Bird	11/01/2023 9:00 AM
Regular	MM/DD/YYYY Select Time

- Registration Workflow
- Approval Workflow

STEP 40

Add range for regular pricing

New Price: \$ 0

Name	Date Range	Time	End Date
Early Bird	11/01/2023	9:00 AM	11/15/2023
Regular	MM/DD/YYYY	Select Time	MM/DD/YY

② Registration Workflow

③ Approval Workflow

STEP 41

Add range for regular pricing

Registration Settings for MEMBER

① Price by Registration Type and Date Range

- Default Price: Default Price is \$0.00
- Price Override: Override the default class price. New Price: \$ 0
- Date-driven Price: Set date specific prices. E.g., Early Bird, Standard or Limited for a specific number of people.

Name	Date Range	Registrant Limit	Price
Early Bird	11/01/2023 - 11/15/2023	25	\$ 75
Regular	MM/DD/YYYY - MM/DD/YYYY		\$

② Registration Workflow

③ Approval Workflow

October 2023

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4
5	6	7	8	9	10	11

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STEP 42

Set your registration limit

The screenshot shows a configuration window with two main sections: "Price Override" and "Date-driven Price".

- Price Override:** Includes a radio button, the text "Override the default class price", and a "New Price" input field set to "\$ 0".
- Date-driven Price:** Includes a radio button, the text "Set date specific prices", and a sub-note: "E.g., Early Bird, Standard or Limited for a specific number of people."

Below these sections is a table with columns "Registrant Limit" and "Price".

	Registrant Limit	Price
9:00 AM - 11/15/2023 9:00 AM	25	\$ 75
9:30 AM - 12/01/2023 9:00 AM	100	\$

At the bottom right of the configuration window are "Cancel" and "Save" buttons.

STEP 43

Set your regular pricing

The screenshot shows a configuration window similar to Step 42, but with the "Date-driven Price" radio button selected.

- Price Override:** Includes a radio button, the text "Override the default class price", and a "Price" input field set to "\$ 0".
- Date-driven Price:** Includes a selected radio button, the text "Set date specific prices", and a sub-note: "E.g., Early Bird, Standard or Limited for a specific number of people."

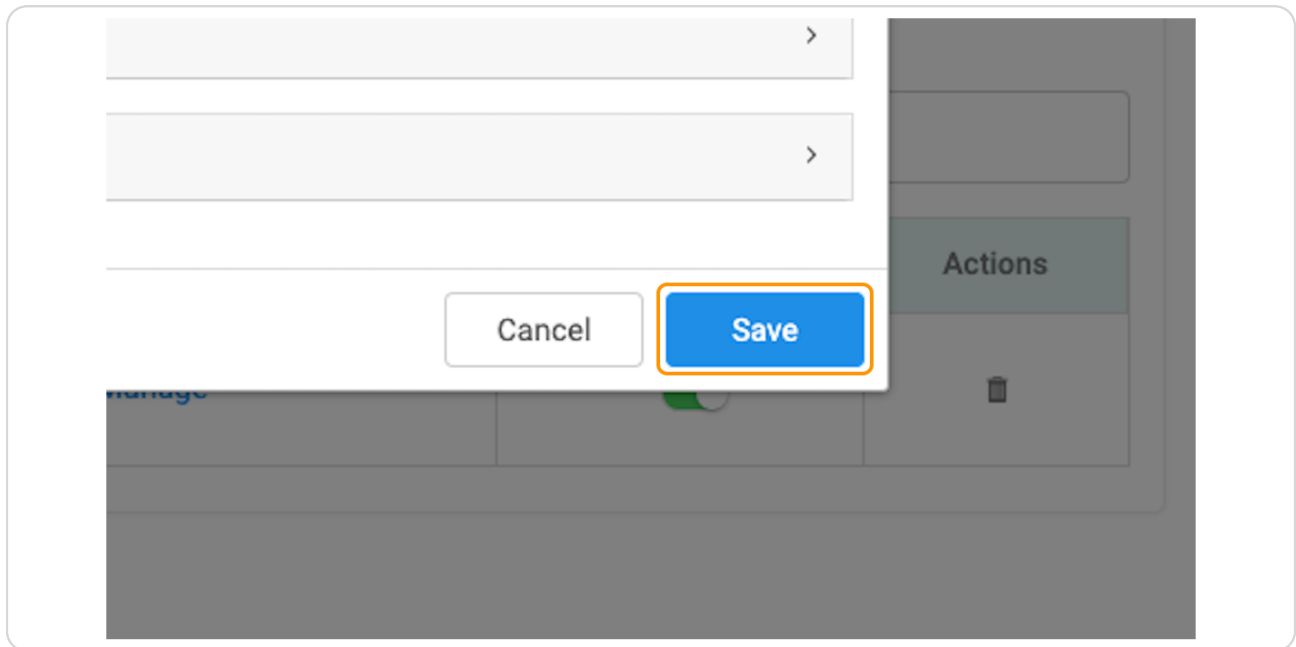
Below these sections is a table with columns "Registrant Limit" and "Price".

	Registrant Limit	Price
11/15/2023 9:00 AM	25	\$ 75
12/01/2023 9:00 AM	100	\$ 125

At the bottom right of the configuration window are "Cancel" and "Save" buttons.

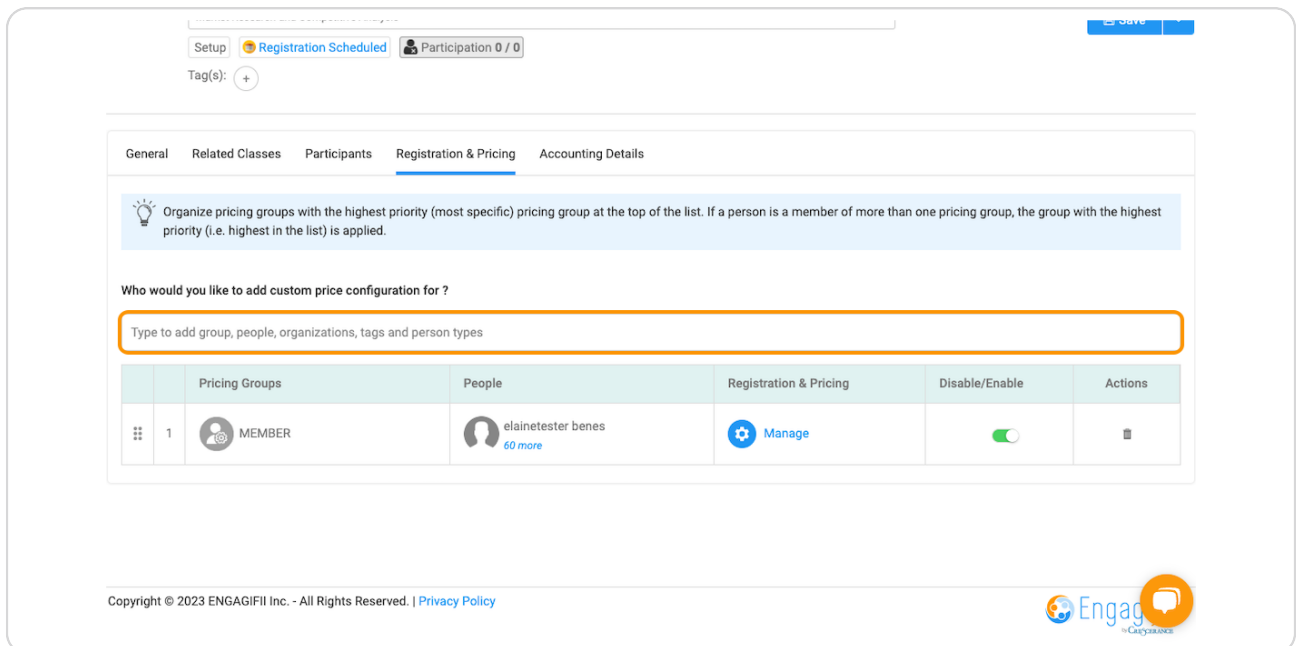
STEP 44

Click on Save



STEP 45

I would like to add special pricing for staff so I will use this search to find "staff"



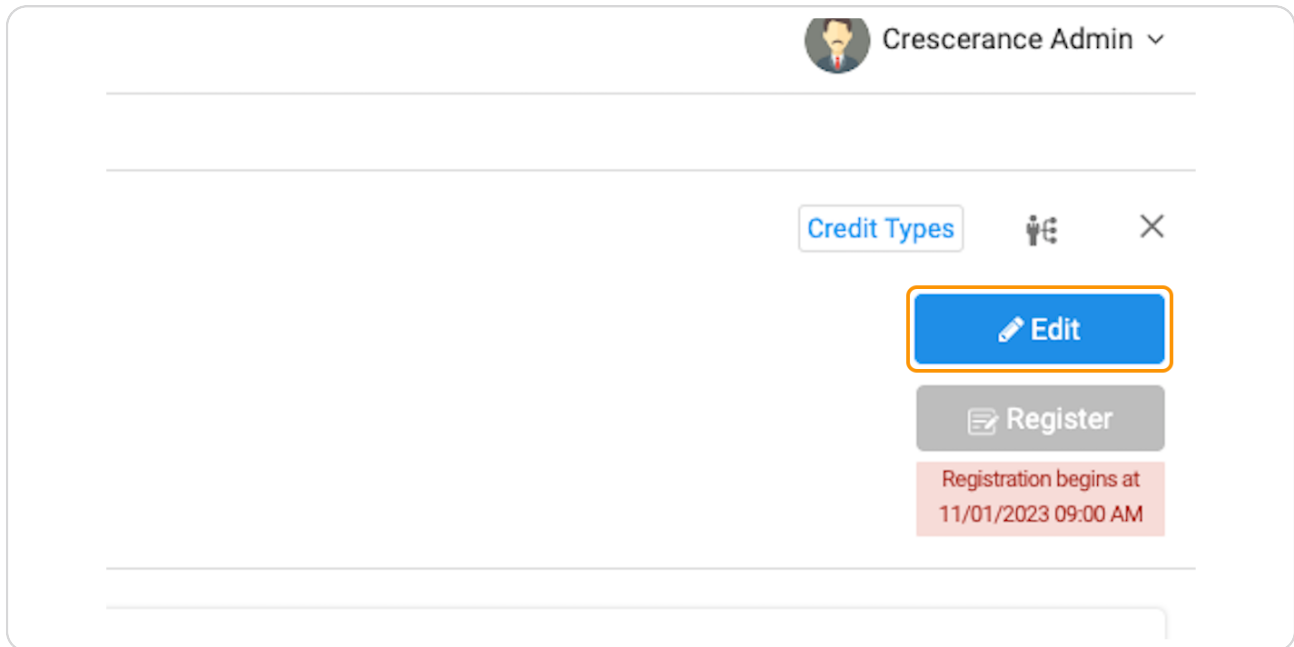
The screenshot shows the 'Registration & Pricing' configuration page in Engagifii. At the top, there are tabs for 'Setup', 'Registration Scheduled', and 'Participation 0 / 0'. Below this is a 'Tag(s):' field with a plus icon. The main content area has tabs for 'General', 'Related Classes', 'Participants', 'Registration & Pricing' (which is active), and 'Accounting Details'. A light blue informational box contains a lightbulb icon and text: 'Organize pricing groups with the highest priority (most specific) pricing group at the top of the list. If a person is a member of more than one pricing group, the group with the highest priority (i.e. highest in the list) is applied.' Below this is a question: 'Who would you like to add custom price configuration for?'. A search input field is highlighted with an orange border, containing the placeholder text 'Type to add group, people, organizations, tags and person types'. Below the search field is a table with the following data:

	Pricing Groups	People	Registration & Pricing	Disable/Enable	Actions
1	MEMBER	elainetester benes 60 more	Manage	<input checked="" type="checkbox"/>	

At the bottom of the page, there is a copyright notice: 'Copyright © 2023 ENGAGIFII Inc. - All Rights Reserved. | [Privacy Policy](#)' and the Engagifii logo.

STEP 46

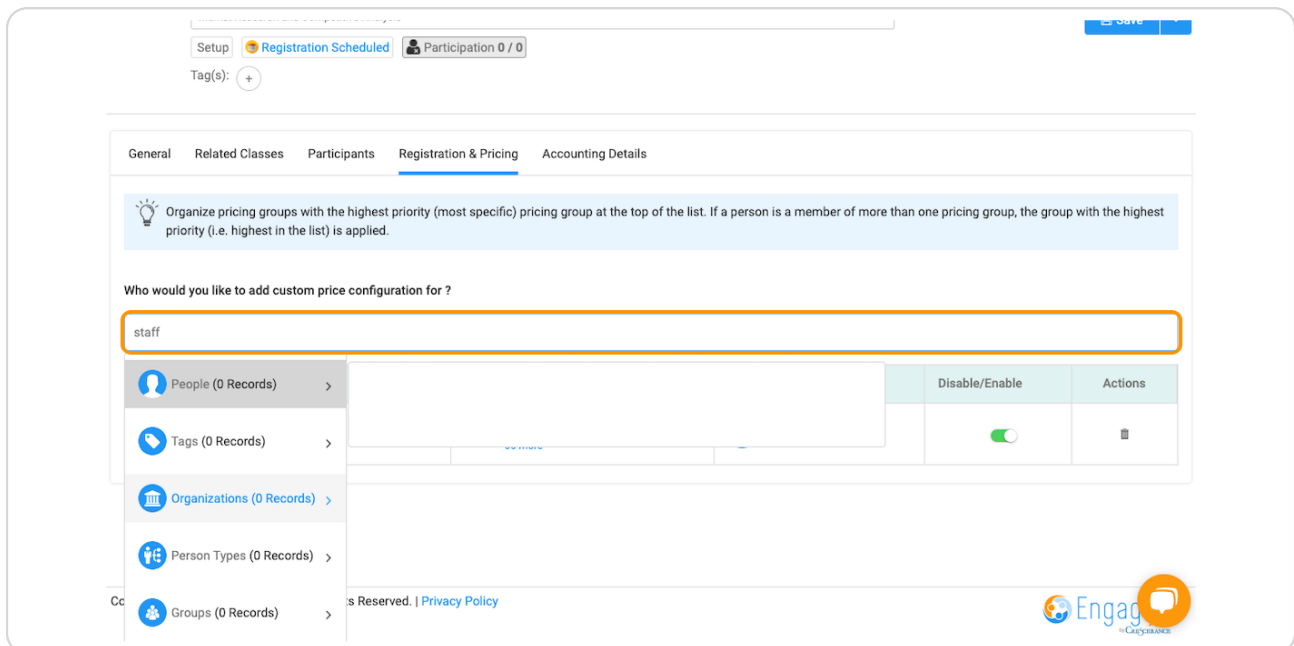
I would like to add another pricing rule so i will click on Edit.



The screenshot shows the user interface for 'Credit Types'. At the top right, the user is identified as 'Crescerance Admin'. Below this, there is a 'Credit Types' label with a list icon and a close button. A blue 'Edit' button with a pencil icon is highlighted with an orange border. Below it is a grey 'Register' button. At the bottom, a red notification box states 'Registration begins at 11/01/2023 09:00 AM'.

STEP 47

I would like to add special pricing for staff so I will use this search to find "staff"



The screenshot shows the 'Registration & Pricing' section of the Engagifii interface. At the top, there are tabs for 'Setup', 'Registration Scheduled', and 'Participation 0 / 0'. Below this, there is a search input field with the text 'staff' entered, highlighted with an orange border. To the left of the search field is a dropdown menu with the following options: 'People (0 Records)', 'Tags (0 Records)', 'Organizations (0 Records)', 'Person Types (0 Records)', and 'Groups (0 Records)'. Below the search field, there is a table with columns for 'Disable/Enable' and 'Actions'. The 'Disable/Enable' column has a green toggle switch, and the 'Actions' column has a trash icon. At the bottom right, there is a logo for 'Engagifii' and a copyright notice '© Engagifii'.

STEP 48

I would like to add special pricing for staff so I will use this search to find "staff"

The screenshot shows a sidebar on the left with navigation options: Awards, Courses, Classes, Venues, Rooms, and Settings and Configuration. The main area has a search bar with the text "staff". Below the search bar is a dropdown menu with the following items:

- People (0 Records)
- Tags (0 Records)
- Organizations (0 Records)
- Person Types (1 Record) - highlighted with an orange box
- Groups (1 Record)

At the bottom of the page, there is a footer with the text "All Rights Reserved. | Privacy Policy".



STEP 49

Click on STAFF

The screenshot shows the search results for "staff". The search bar contains "ff". The dropdown menu is open, showing the following items:

- People (0 Records)
- Tags (0 Records)
- Organizations (0 Records)
- Person Types (1 Record) - highlighted with a grey background
- Groups (1 Record)



Below the dropdown menu, there is a table with the following columns: "People" and "Registration & Pricing". The table contains one row with the following data:

People	Registration & Pricing
 elainetester benes 60 more	 Manage

At the bottom of the page, there is a search bar with the text "Type to search...". Below the search bar, there is a button labeled "STAFF" with a gear icon, highlighted with an orange box.

STEP 50


Click on **Manage**

	Registration & Pricing	Disable/Enable
enes	 Manage	<input checked="" type="checkbox"/>
Admin	 Manage	<input checked="" type="checkbox"/>

STEP 51


I am setting the standard price for all staff the entire duration of registration.

ge

 Price Override

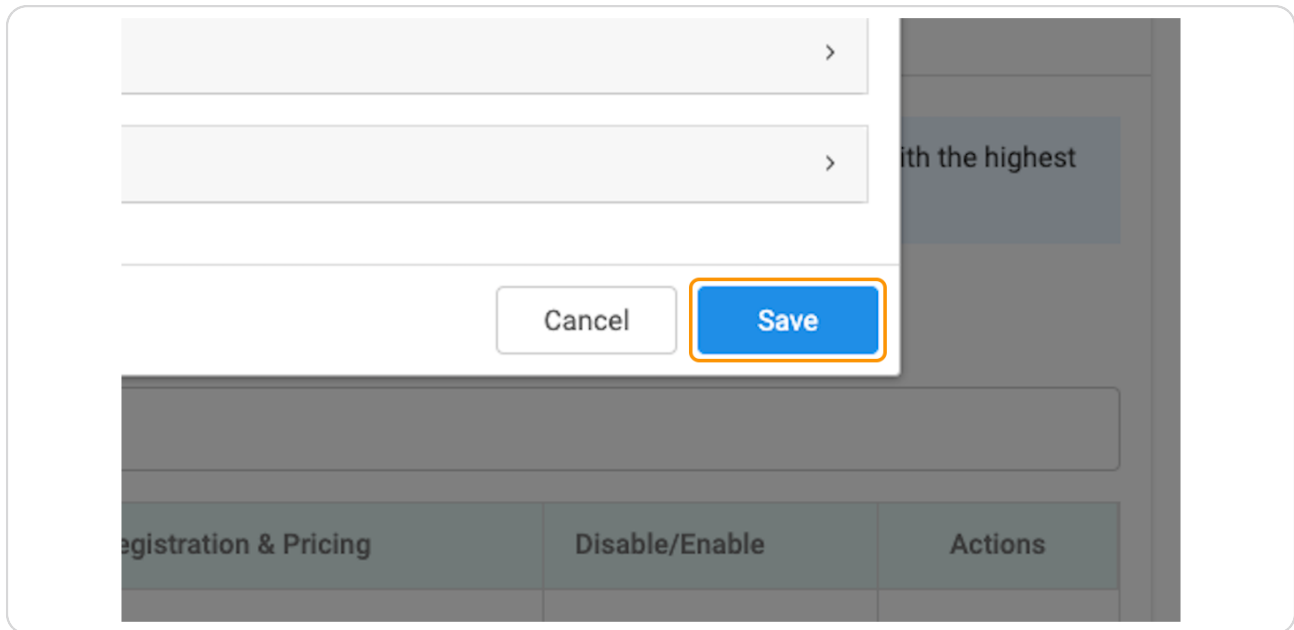
Override the default class price

New Price:

 S
E
o

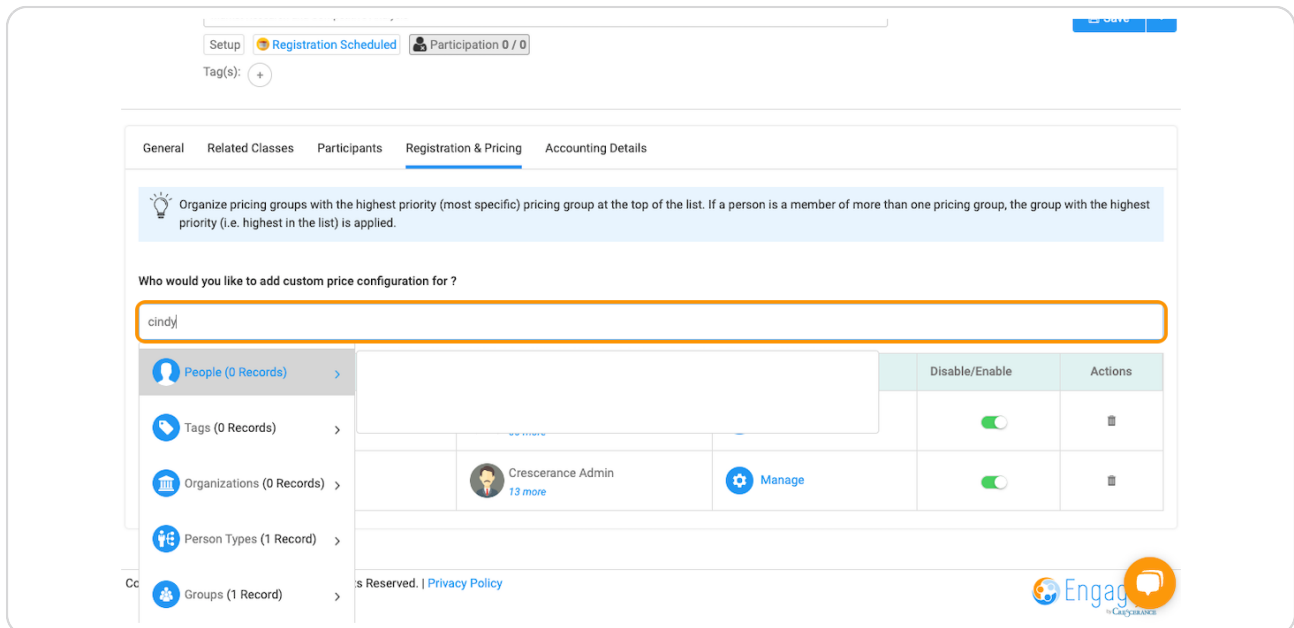
STEP 52

Click on Save



STEP 53

I have a guest speaker named Cindy I would like to register but not have to pay. I will set a pricing rule just for her by searching her name through "people."



STEP 54

I have a guest speaker named Cindy I would like to register but not have to pay. I will set a pricing rule just for her by searching her name through "people."

The screenshot shows a sidebar on the left with navigation options: Accreditation, Awards, Courses (highlighted), Classes, Venues, Rooms, and Settings and Configuration. The main content area has a light blue tip: "Organize pricing groups with the highest priority (most specific) pricing priority (i.e. highest in the list) is applied." Below this is a question: "Who would you like to add custom price configuration for?". A search input field contains the text "cindy". A dropdown menu is open, listing categories: "People (0 Records)", "Tags (0 Records)", "Organizations (0 Records)", and "Person Types (1 Record)". The "People (0 Records)" option is highlighted with an orange border.




STEP 55


Click on CINDY CARLTON...

The screenshot shows the same search interface as in Step 54. The search input field now contains "cindy". The dropdown menu is open, and the "People (1 Record)" option is highlighted with an orange border. The search results for "People" are displayed, showing a search bar with "Type to search...", a profile card for "CINDY CARLTON" with the email "cindycf@yopmail.com", and a "13 more" link. The footer of the results area includes "s Reserved. | Privacy Policy".

STEP 56

Click on **Manage**

	Registration & Pricing	Disable/Enable
enes	 Manage	<input checked="" type="checkbox"/>
Admin	 Manage	<input checked="" type="checkbox"/>
RON	 Manage	<input checked="" type="checkbox"/>



STEP 57

Click on **Save**

>

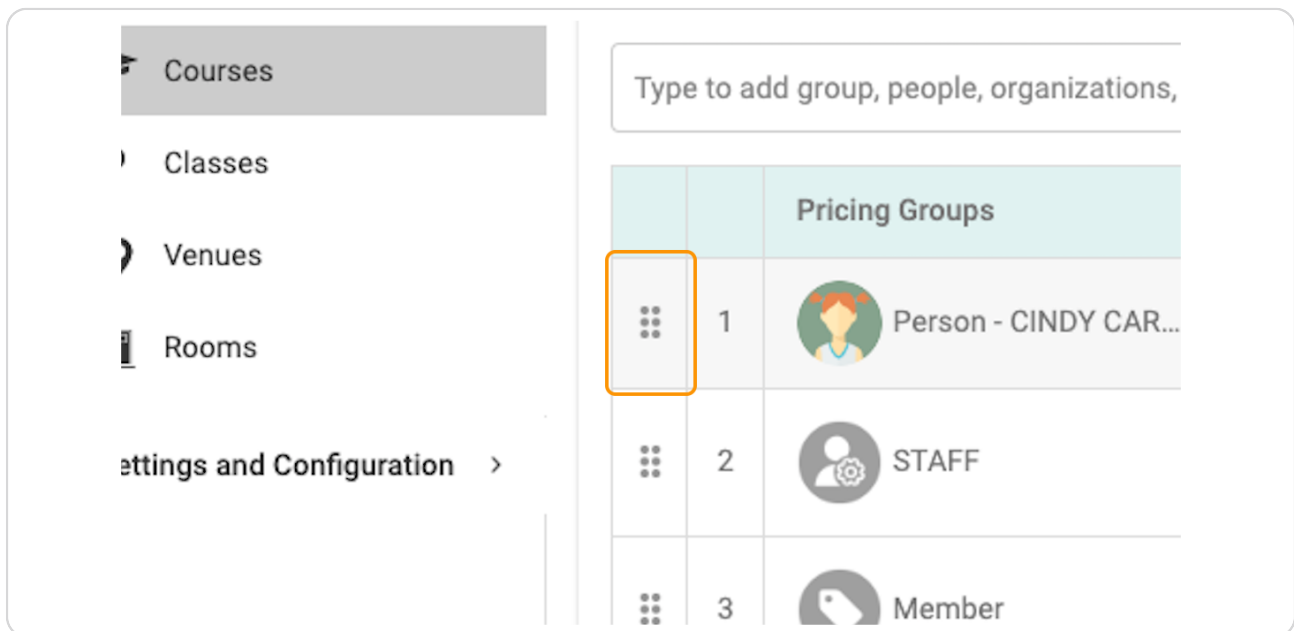
>

with the highest







gistration & Pricing Disable/Enable Actions

STEP 58

You can order the pricing rules to set seniority effect. Even if Cindy is a member or staff, she won't have to pay because her pricing rule is at the top of the list.

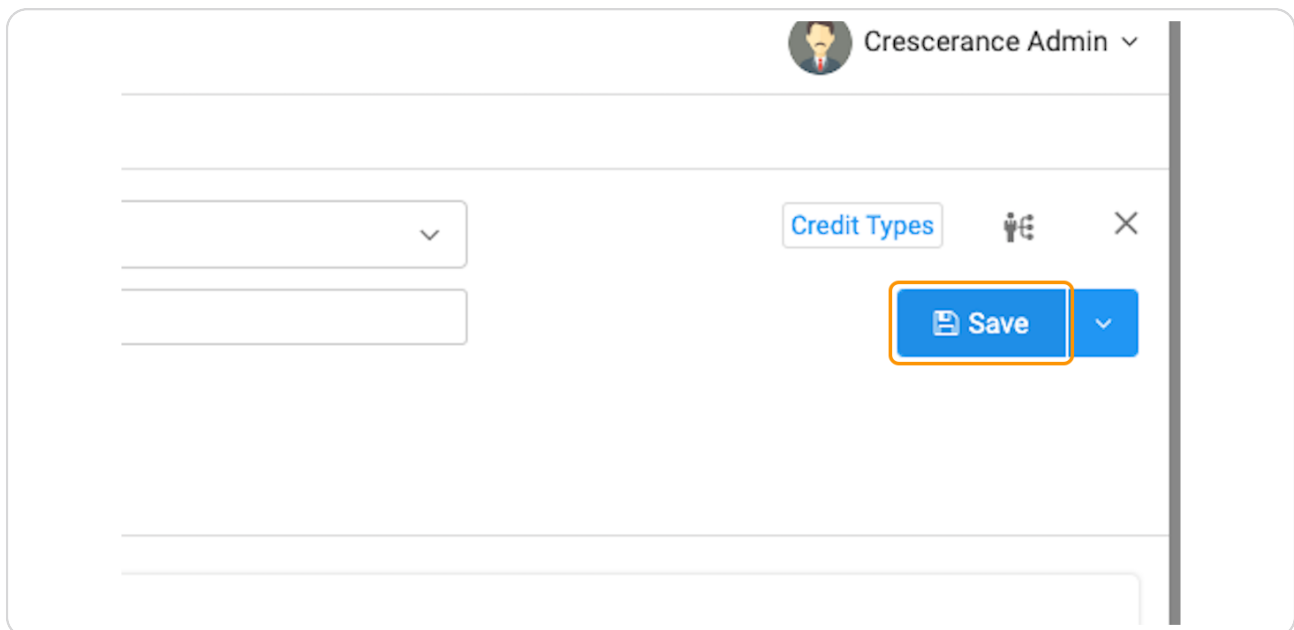


The screenshot shows a sidebar on the left with navigation options: Courses, Classes, Venues, Rooms, and Settings and Configuration. The main area displays a table of Pricing Groups. The first group is 'Person - CINDY CAR...' with a drag handle icon highlighted by an orange box. The second group is 'STAFF' and the third is 'Member'.

Pricing Groups		
	1	 Person - CINDY CAR...
	2	 STAFF
	3	 Member

STEP 59

Click on Save






The screenshot shows a user interface with a user profile 'Crescerance Admin' at the top right. Below the profile, there are several input fields and a 'Credit Types' section. A blue 'Save' button is highlighted with an orange box.

STEP 60

Click on **Manage**




Accounting Details

	Registration & Pricing	Disable/Enal
y Carlton	 Manage	<input checked="" type="checkbox"/>
cerance Admin View	 Manage	<input checked="" type="checkbox"/>
etester benes View	 Manage	<input checked="" type="checkbox"/>

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STEP 61



Click on **Manage**

	Registration & Pricing	Disable/Enable
		<input checked="" type="checkbox"/>
Admin		<input checked="" type="checkbox"/>
enes		<input checked="" type="checkbox"/>

STEP 62

I have set her price to override to "0"

ige

  **Price Override**

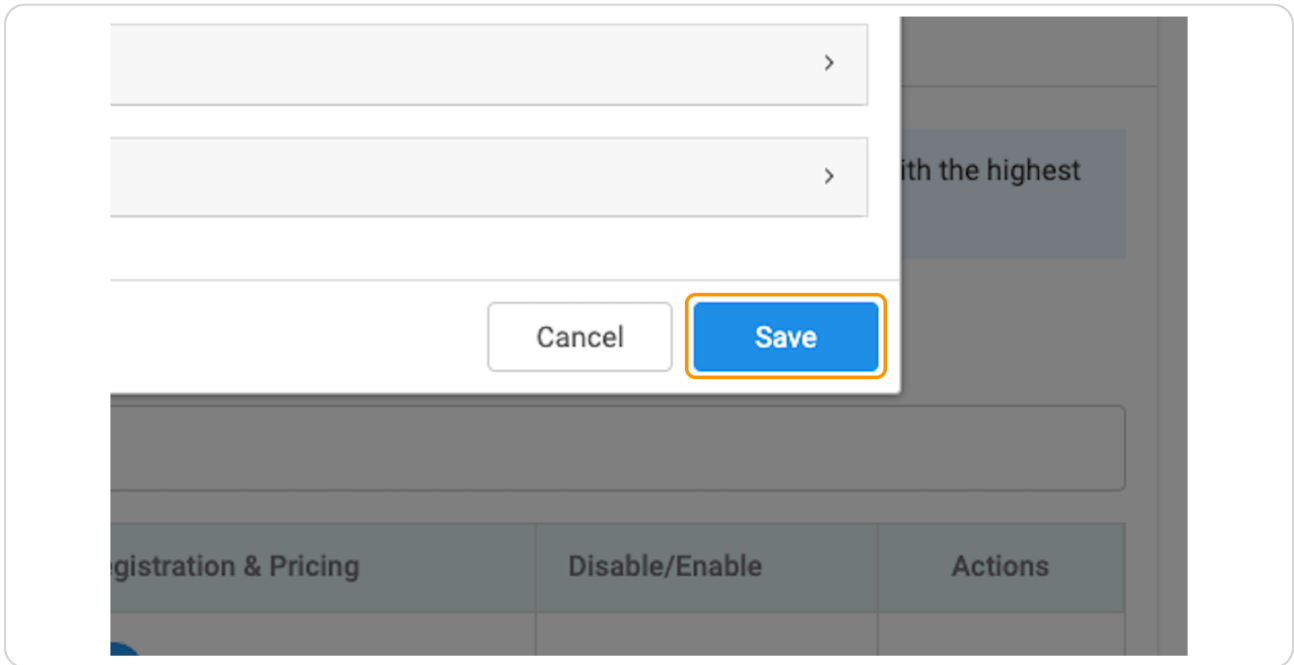
Override the default class price

New Price:

S
E
o

STEP 63

Click on Save



STEP 64

Click on Save

