



Serving Clients & Building Revenue with Contract Training Events

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Agenda



1. Definition & use cases for Contract Training
2. Public Session vs Contract Training event
3. Enrole user experience
4. Client contact experience
5. Attendee self-registration experience
6. Recap

Definition of Contract Training event

- Non-public event
- Sponsored by one or more organizations
- Event fee paid by primary sponsoring organization
- No fee for adding invited attendees to roster



Use cases for Contract Training events

Contract Training events allow for an expanded revenue base through serving the market for events with private rosters.

Use cases:

1. Event for which client provides attendee list
2. Event for which client contact registers attendees
3. Event for which client invites attendees to self-register
4. Event for which multiple collaborating organizations register or invite attendees



Public Session vs Contract Training (1 of 3) entrinsic



Public Session

- Open to the public
- Visible on shopping cart site (optional)
- No specific organization
- Self-registration via shopping cart
- Registration via Enrole



Contract Training event

- Not open to the public
- Not visible on shopping cart site
- One or more sponsoring organizations
- Self-registration for invited attendees
- Registration via Enrole & Client Portal

Public Session vs Contract Training (2 of 3) entrinsicon



Public Session

- Individual fees for registrations
- Individual invoices for open balances
- Attendees can pay via shopping cart
- Event Type “SESS”
- Registrations: Type “RG”
- Registrations Status “Enrolled”



Contract Training event

- One fee for primary sponsoring organization
- Single invoice for client contact
- Client contact can pay via shopping cart
- Event Type “ONSITE”
- Registrations (attendees): Type “RG”
- Registrations (attendees): Status “Enrolled”
- Main CT event Order: Type “INH”
- Main CT event Order: Status “Verified”

Public Session vs Contract Training (3 of 3) entrinsic

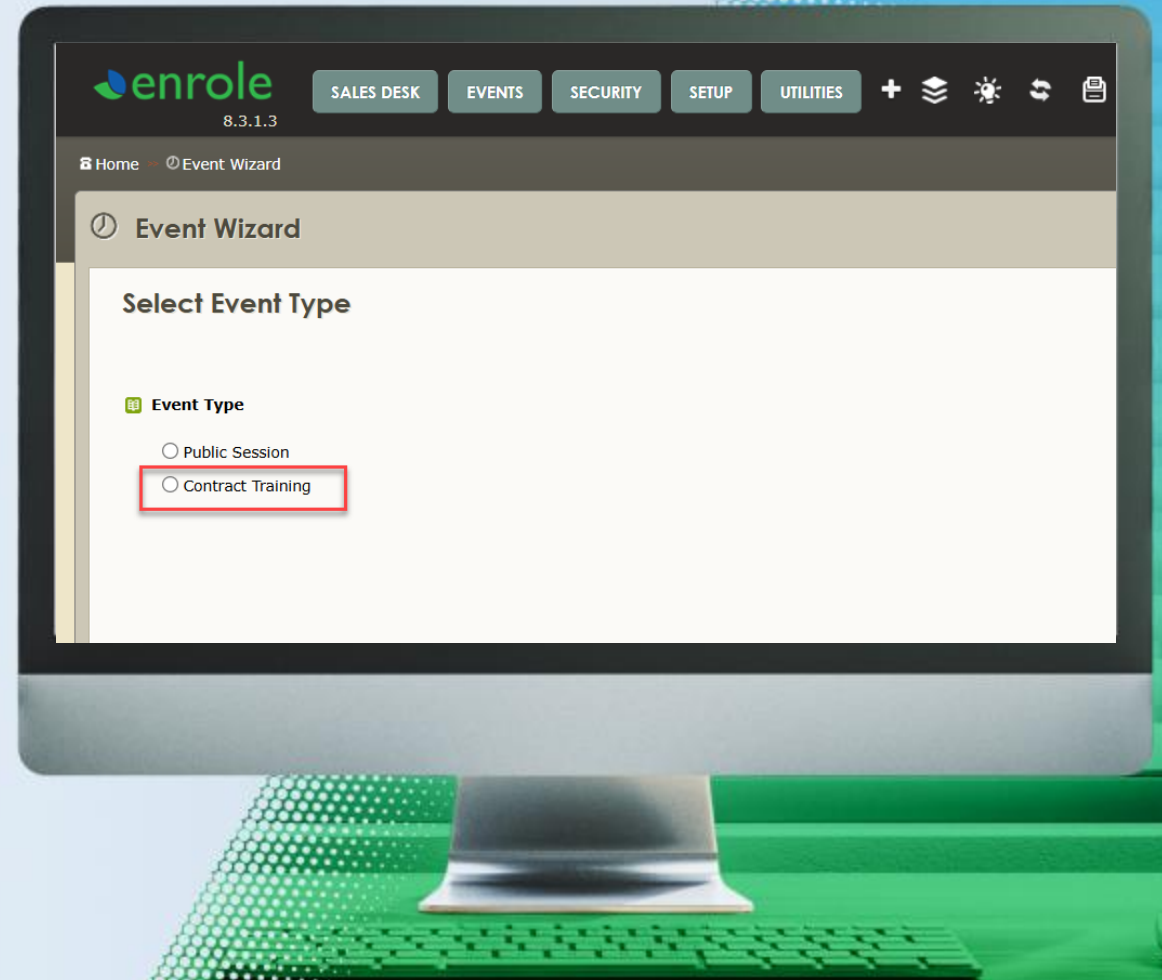
BOTH Public Sessions & Contract Training events

- Confirmation emails for individual registrations
- Instructor Portal options

Enrole user experience (1 of 2)

Enrole user experience in ENROLE HOME

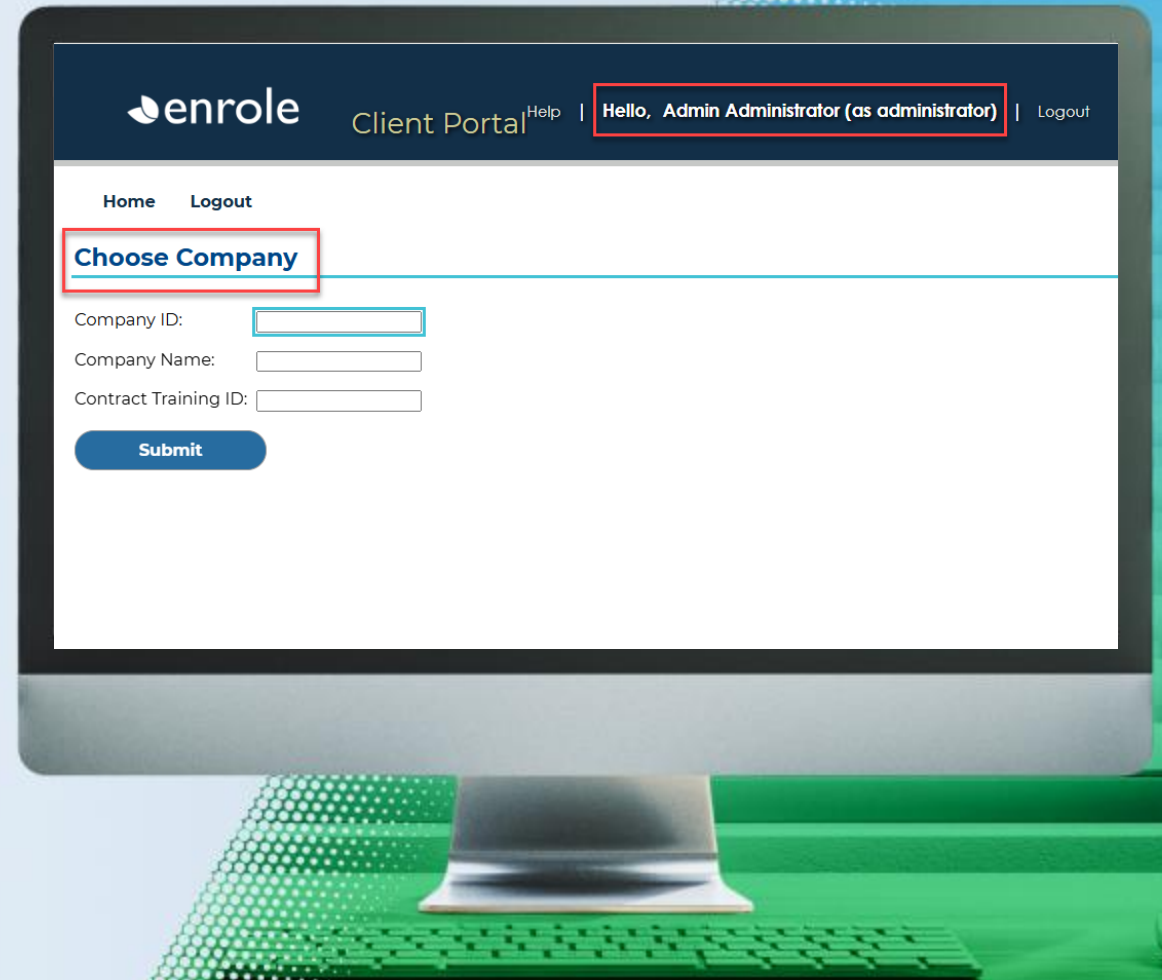
- Add Contract Training event
- Create main event Order
- Add and remove event attendees
- Add one or more secondary Companies
- Add employees for any sponsoring Company



Enrole user experience (2 of 2)

Enrole user experience in CLIENT PORTAL

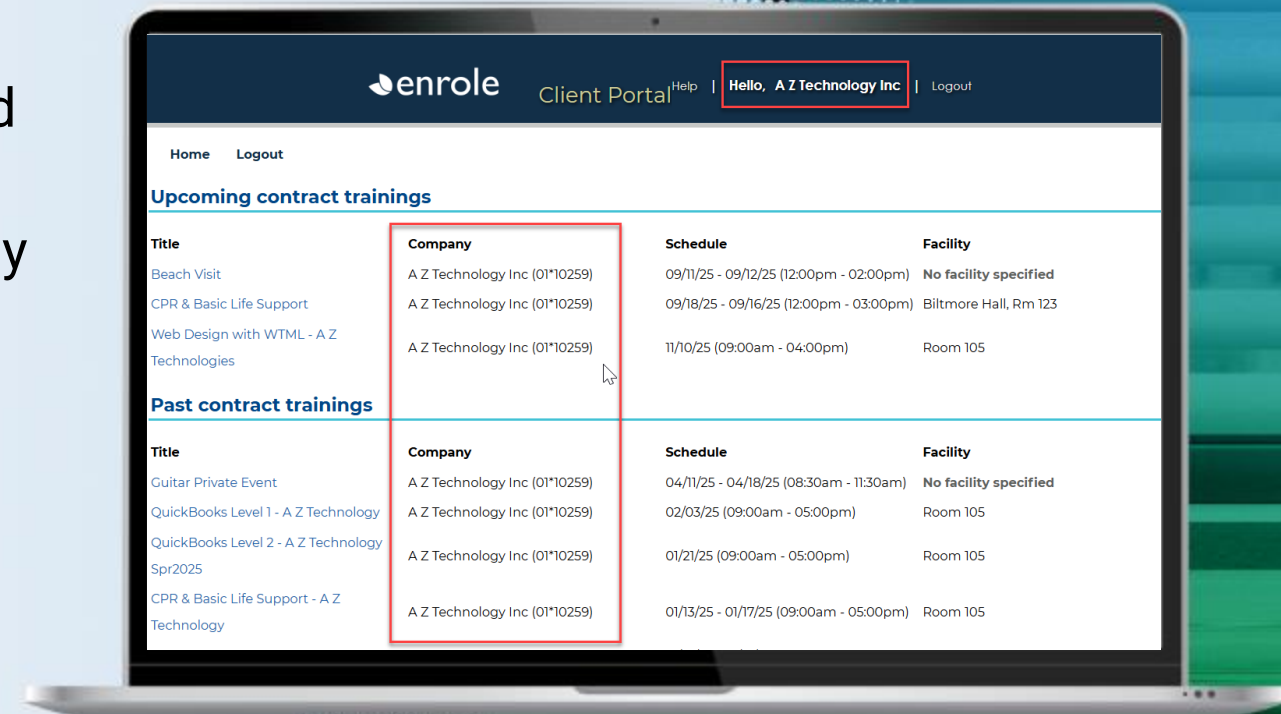
- Log in with Enrole username & password
- Access events associated with any Company
- Add and remove event attendees
- Add employees for any sponsoring Company



Client contact experience (1 of 2)

Client contact experience in CLIENT PORTAL

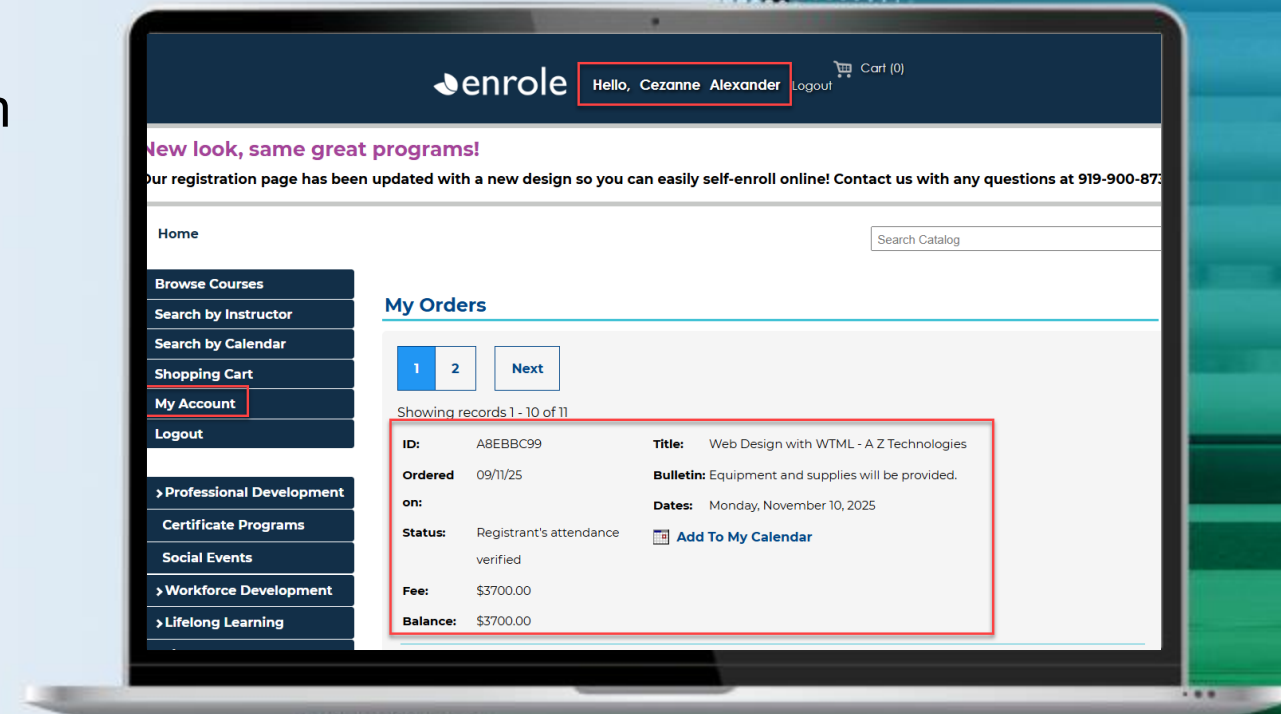
- Log in with Company ID & password provided by Enrole user
- Access events associated with own Company
- Add and remove event attendees
- Add Company employees
- Access self-reg code & link to provide to invited attendees



Client contact experience (2 of 2)

Client contact experience on SHOPPING CART SITE

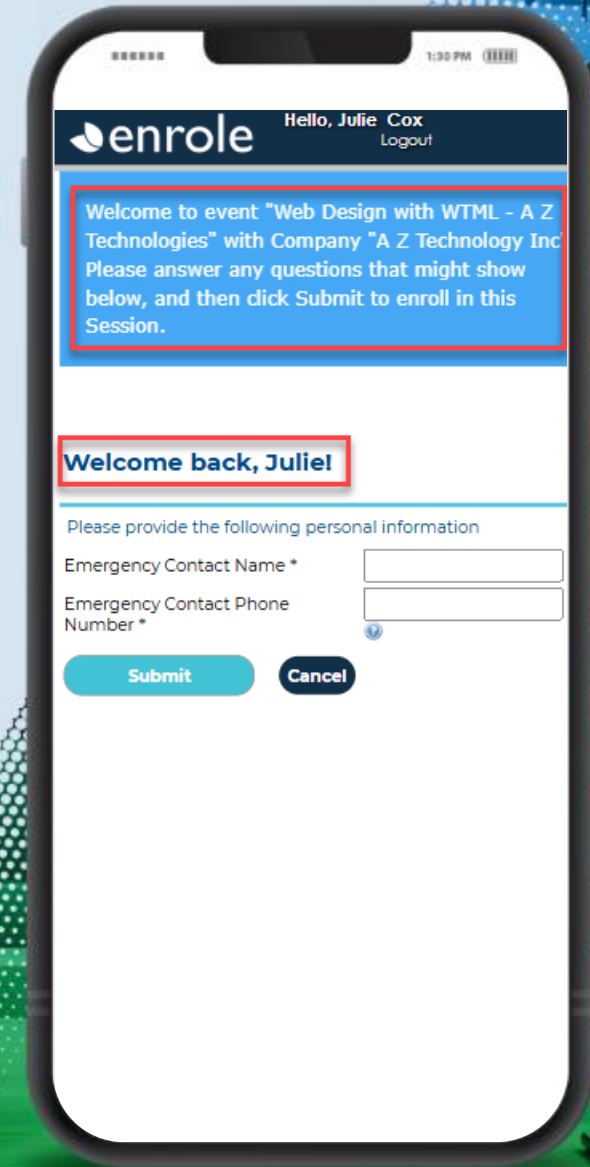
- Log in with individual client contact cart login credentials
- View main event Order
- Pay balance for main event Order



Attendee self-reg experience (1 of 2)

Attendee self-registration WITH EXISTING LOGIN

- Log into shopping cart with existing username & password
- Use hyperlinked self-reg code for Contract Training event
- Respond to Required UDFs (if any) to complete registration
- View welcome message & receive confirmation email



The image shows a smartphone screen displaying the Enrole app interface. At the top, the Enrole logo is on the left, and the user's name "Hello, Julie Cox" and a "Logout" link are on the right. Below this, a blue-bordered box contains a welcome message: "Welcome to event 'Web Design with WTML - A Z Technologies' with Company 'A Z Technology Inc'. Please answer any questions that might show below, and then click Submit to enroll in this Session." Below this message, another blue-bordered box says "Welcome back, Julie!". Underneath, there is a section titled "Please provide the following personal information" with two input fields: "Emergency Contact Name *" and "Emergency Contact Phone Number *". At the bottom of this section are two buttons: "Submit" (in a blue rounded rectangle) and "Cancel" (in a dark grey rounded rectangle).

Attendee self-reg experience (2 of 2)

Attendee self-registration WITHOUT EXISTING LOGIN

- Use hyperlinked self-reg code for Contract Training event
- Create profile, including username & password
- Respond to Required UDFs (if any) to complete registration
- View welcome message & receive confirmation email

The image shows a smartphone displaying the Enrole mobile application interface. At the top, there is a dark blue header with the 'enrole' logo on the left and a white 'Enter Password' input field on the right. Below the header, there is a white 'Sign In' button and two links: 'Forgot your user name?' and 'Forgot your password?'. A blue banner below the header contains the text: 'Welcome to event "Web Design with WTML - Technologies" with Company "A Z Technology". Please answer any questions that might show below, and then click Submit to enroll in this Session.' Below the banner, there is a red-bordered button labeled 'Add Attendee'. Underneath the button, the 'Company' field is populated with 'A Z Technology Inc (01*10259)'. A section titled 'Please provide the following personal information' contains several input fields: 'Email Address *', 'Username (email) *', 'First Name *', 'Middle Name', 'Last Name *', 'SSN (NNN-NN-NNNN) *', 'Address *', and 'Address Line 2'. Each field has a corresponding text input box.

Recap



1. Use cases for Contract Training
2. Public Session vs. Contract Training event
3. Enrole user experience
4. Client contact experience
5. Attendee self-registration experience
6. Resources

Resources

- [Understanding Contract Training Events](#)
- [Creating a Contract Training Event in Enrole Home](#)
- [Managing a Contract Training Event in Enrole Home](#)
- [Adding and Removing Contract Training Attendees in Enrole Home](#)
- [Distinguishing Between the Contract Training Main Order and Attendee Orders](#)
- [Understanding the Client Portal for Contract Training Events](#)
- [Setting up Client Portal Access](#)
- [Logging into the Client Portal as an Enrole User](#)
- [Logging into the Client Portal as a Client Contact](#)
- [Adding and Removing Contract Training Attendees in the Client Portal](#)
- [Logging in or Creating a Profile with Contract Training Self Reg Code](#)
- [Self-Registering for a Contract Training Event](#)





Thank you for joining us!

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