

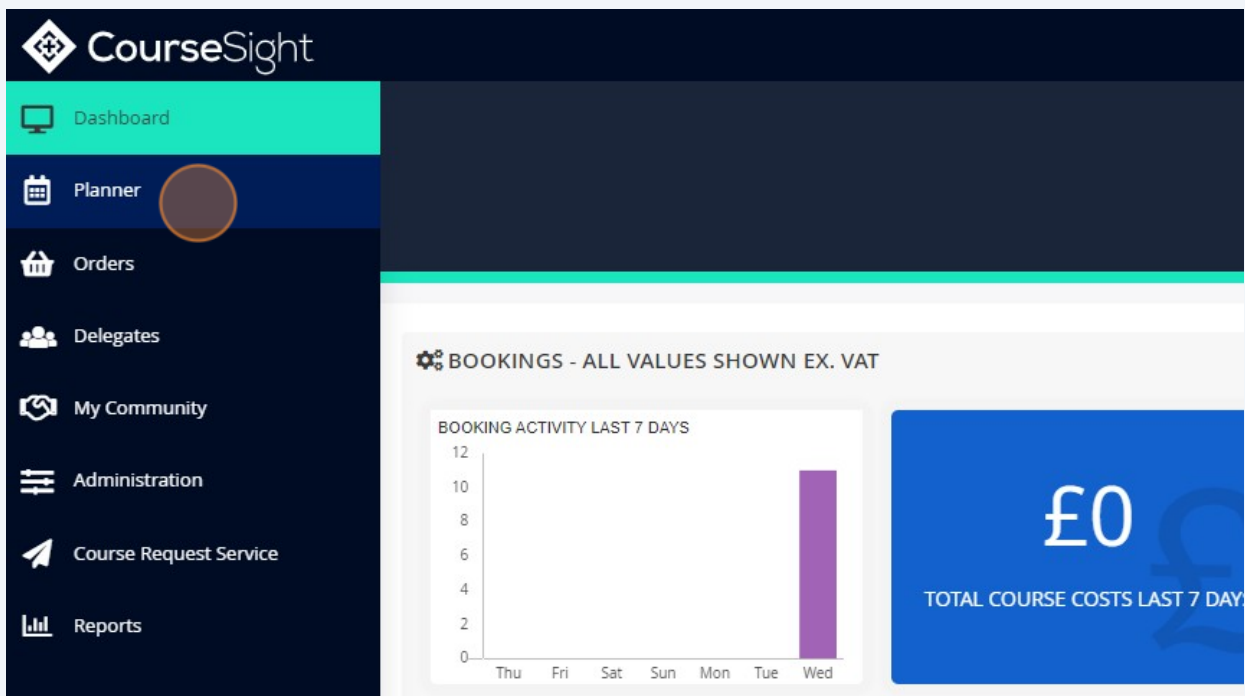
# Adding Delegates to Allocated Places

Follow this process to add delegate names and issue joining instructions for sessions that you have already paid for and been allocated spaces for by a member of the team.

- 1 Login to your account at: <https://coursesight.co.uk/account/auth/login>

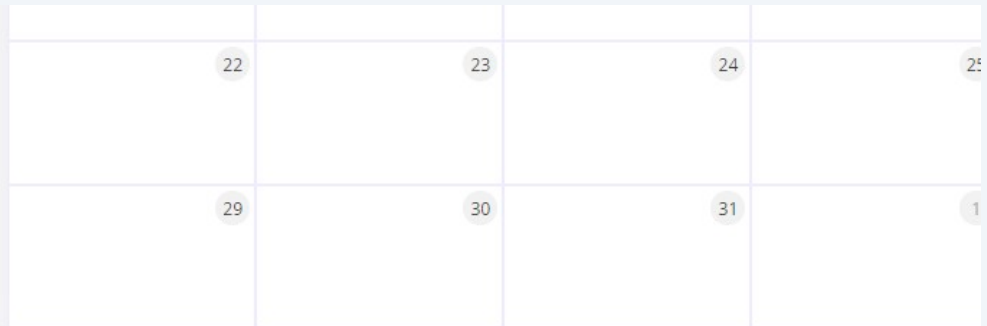
Your login should already have been allocated to you, if it has not please contact Ann Craft Trust support.

- 2 Once logged in, from your Dashboard, click "Planner"



3

Scroll down or change the months to find the courses allocated to you, this may be in the calendar or below it for elearning. The click on the course title to open the delegate page.



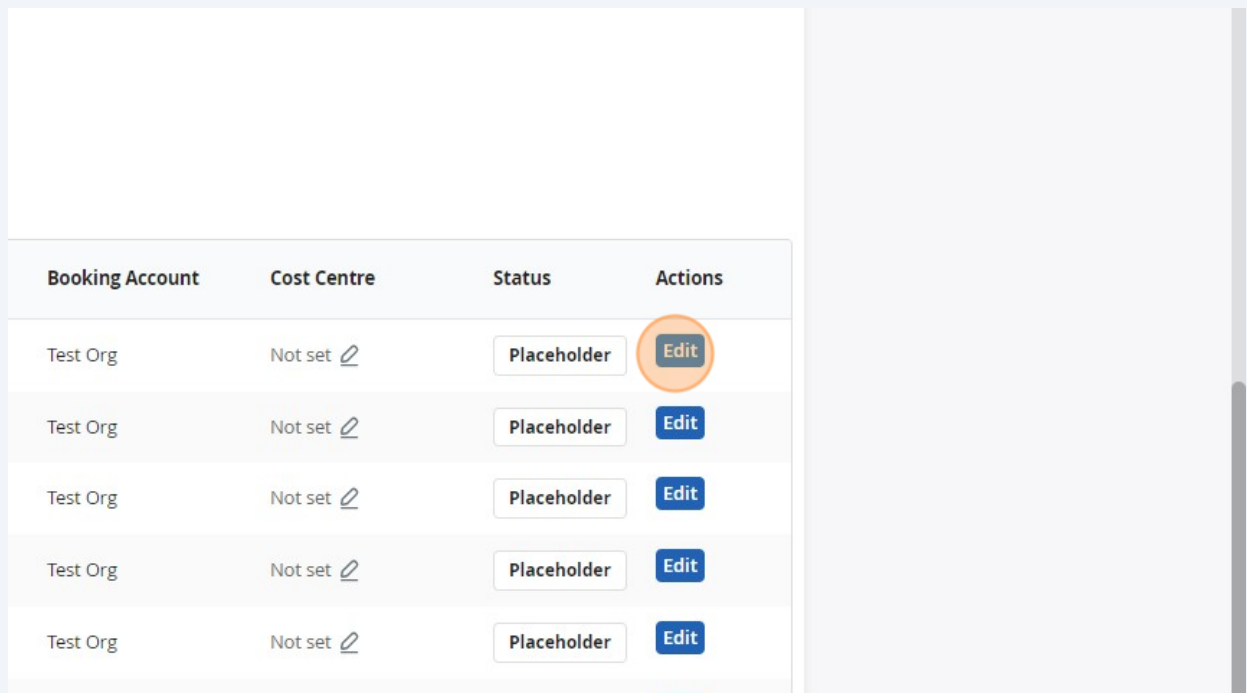
22	23	24	25
29	30	31	1











#### Rolling Courses Active in January

Course Title	Provider
<a href="#">Mental Health Awareness Course</a>	Demo Training Provider 1

4

On the delegate page there will be Placeholders ready for your delegate details to be entered. You may have to click "show" for these to appear at the bottom on the page. Once you are ready to enter your delegate details, Click "Edit".



Booking Account	Cost Centre	Status	Actions
Test Org	Not set 	Placeholder	
Test Org	Not set 	Placeholder	
Test Org	Not set 	Placeholder	
Test Org	Not set 	Placeholder	
Test Org	Not set 	Placeholder	

5 Enter the Delegate Name, Surname and Email Address.

The screenshot shows a form titled "Assign Delegate to Placeholder" with the following fields: "First Name\*" containing "Delegate", "Surname\*" containing "Smith" (highlighted with an orange circle), "Delegate Email Address\*" containing "john.smith@example.com", "Cost Centre" (empty), and "Date of Birth" with a placeholder "DD/MM/YYYY".

6 You can also enter a Cost Centre code if you wish, but this is optional and only for your records.

The screenshot shows the same form as above, but with the "Cost Centre" field highlighted by an orange circle. The "First Name" field now contains "Delegate" and the "Surname" field contains "Name". At the bottom, there is a checkbox for "Send Joining Instructions" and "Update" and "Cancel" buttons.

7

There may be other optional or mandatory fields associated with each course, if they hold a red star they are mandatory and must be entered before saving.

Name Delegate

Delegate Email Address \*

Delegate Email

Cost Centre

Optional

Date of Birth

DD/MM/YYYY

Send Joining Instructions

8

Ensure that you tick "Send Joining Instructions" to allow the delegate to access their course information and content. If the course is elearning, this is the only way that they can access their course.

Delegate Email

Cost Centre

Optional

Date of Birth

DelegateDOB

Send Joining Instructions

9

Finally, click "Update". This immediately sends the delegate details to the training team and sends the joining instructions to the delegate.

mail

B

g Instructions

**Update** Cancel

Test.Org	Not set	Placeholder	Edit
Test.Org	Not set	Placeholder	Edit
Test.Org	Not set	Placeholder	Edit
Test.Org	Not set	Placeholder	Edit