

# CRM - Editing and Removing Program Offerings

Article Number: 3786 | Rating: 1/5 from 1 votes | Last Updated: Wed, Jan 26, 2022 at 10:08 AM



2018

## CRM - Editing and Removing Program Offerings

### Edit a Program Offering

Login to the workforce CRM.

<https://recruiter.mc3.edu/coned>

1. Open an advanced find by clicking on the **Filter** button.



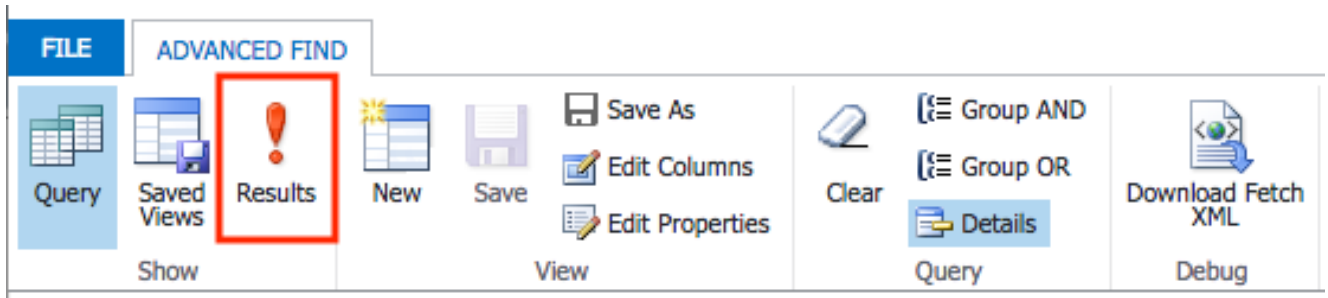
2. Change the **Look For** to **M45Programs**.

**Look for:**

3. Change the **Use Saved View** to **Active M45Programs**.

**Use Saved View:**

4. Select **Results**.



5. Notice there are duplicate options because there are two different training intents Company and Individual.

Advanced Diagnostic Imaging Modality Education	Individual	Yes	Bernadette Debi...	10/18/2018 3:03 PM
Certified Nursing Assistance	Individual	Yes	Lori Spiezio	10/17/2018 2:39 PM
Computer/IT Training	Individual	Yes	Anil Datta	8/3/2017 4:26 PM
Computer/IT Training	Company	Yes	Anil Datta	8/3/2017 4:30 PM
Culinary Boot Camp	Individual	Yes	Can Uslu	10/18/2018 12:52 PM
Culinary ServSafe	Individual	Yes	Can Uslu	10/18/2018 12:54 PM
Drivers Training	Individual	Yes	Gary Hines	8/3/2017 4:27 PM
English as a Second Language (ESL)	Individual	Yes	Marjorie Labe	8/3/2017 4:36 PM
Healthcare Training	Individual	Yes	Bernadette Debi...	8/3/2017 4:26 PM
Lean/Process Training	Company	Yes	Gary Hines	8/3/2017 4:30 PM
Manufacturing and Industrial Training	Individual	Yes	Gary Hines	8/3/2017 4:25 PM
Manufacturing and Industrial Training	Company	Yes	Gary Hines	8/3/2017 4:29 PM



6. Select the title of the program you would like to change.

7. Enter all the fields required as denoted by the \*.

M45 PROGRAMS : INFORMATION

# New M45 Programs

## General

Program Name *	 --
Training Intent *	--
Available on the We *	<b>Yes</b>
Program Owner *	--
Owner *	 <b>Julie Lopez</b>

- **Program Name** is what shows to users when filling out the inquiry form.
- **Training Intent** is where the program will be shown on the inquiry form (Company or Individual).

**Note:** If you want to program to show on both options you will need to create two programs and select each training intent.

- **Available on the Web** allows you to have a training type available for staff to use but not shown on the inquiry form.
- **Program Owner** is the staff member who is the subject matter expert on the program. The emails and phone calls will be assigned to this user.
- **Owner** can be left alone.

6. Select **Save and Close** when you are finished setting up the program.

## Remove a Program Offering

ogin to the workforce CRM.

<https://recruiter.mc3.edu/coned>

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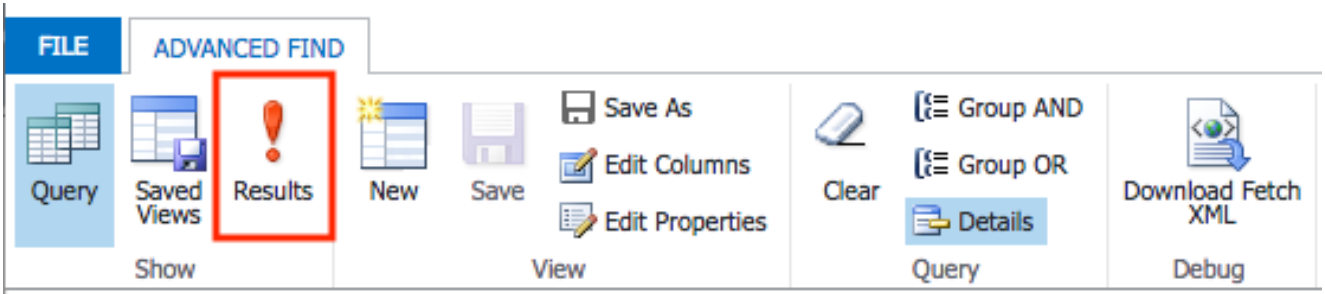
2. Change the **Look For** to **M45Programs**.



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4. Select **Results**.



5. Notice there are duplicate options because there are two different training intents Company and Individual.

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Manufacturing and Industrial Training	Company	Yes	Gary Hines	8/3/2017 4:29 PM

6. Select the title of the program you would like to remove.

Program Name ↑	Training Intent	Available on the ...	Program Owner	Created On
Advanced Diagnostic Imaging Modality Education	Individual	Yes	Bernadette Debi...	10/18/2018 3:03 PM
Certified Nursing Assistance	Individual	Yes	Lori Spiezio	10/17/2018 2:39 PM
Computer/IT Training	Individual	Yes	Anil Datta	8/3/2017 4:26 PM
<input checked="" type="checkbox"/> Computer/IT Training	Company	Yes	Anil Datta	8/3/2017 4:30 PM
Culinary Boot Camp	Individual	Yes	Can Uslu	10/18/2018 12:52 PM

7. Click **Deactivate** on the ribbon, and the program will be removed from the inquiry form.

Microsoft | Dynamics 365 Julie Lopez  
CONED

FILE ADVANCED FIND LIST TOOLS M4SPROGRAMS

Activate  
 Deactivate  
 Delete M45 Programs

New M45 Programs Edit Show As... Mail Merge Unfollow Connect... Assign M45Programs Share Copy a Link Email a Link Run Workflow Start Dialog Run Report Excel Templates Word Templates Export M45Programs

Records Collaborate Process Data

Program Name ↑	Training Intent	Available on the ...	Program Owner	Created On
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<input checked="" type="checkbox"/> Computer/IT Training	Company	Yes	Anil Datta	8/3/2017 4:30 PM
Culinary Boot Camp	Individual	Yes	Can Uslu	10/18/2018 12:52 PM

Posted - Wed, Oct 31, 2018 at 2:37 PM. This article has been viewed 3451 times.

Online URL: <https://kb.mc3.edu/article/crm-editing-and-removing-program-offerings-3786.html>