

		Software Name _____	
Category	Software Functionality. (Answer "Yes, No, or Modification Needed" in the right column)	Yes/ Modification/ No	Comment
<b>1.0</b>	<b>Activity Registration Components</b>		
1.0.1	Copy activity information for future sessions		
1.0.2	Email rosters to staff/instructors		
1.0.3	Separate registration dates for resident and non-resident as well as online, mail-in, and walk-in.		
1.0.4	Access to retired (inactive) activity code/enrollment information		
1.0.5	Option to Refund/Transfer/Void/Deposit/Payment Plan		
1.0.6	Retire sessions and/or activities		
1.0.7	Automatically calculate & apply resident/non-resident, seniors, discount fees/coupons or incentive to programs		
1.0.8	Option to include screen alert and/or receipt notes during activity registration to notify customer of any special circumstances		
1.0.9	Configure custom questions as part of activity enrollment		
1.0.10	Warn customer if registration doesn't meet the age/grade/gender criteria		
1.0.11	Does not allow duplicate registrations		
1.0.12	Ask for cancellation reason when issuing refund		
1.0.13	Hide individual activity registration from public enrollment		
1.0.14	Option to change activity status to open/closed/cancelled		
1.0.15	Multiple screen option during registration - search customer or class info while processing a transaction		
1.0.16	Search for customer by more fields other than customer name		
1.0.17	Electronic online waiver authorization		
1.0.18	Flexibility to pro-rate or change price during enrollment		
1.0.19	Easy reference to last transaction processed (receipt number, customer, etc.)		
1.0.20	Customize waivers and set up various waivers depending on activity		
1.0.21	Alert end user of duplicate customer account when registering		
1.0.22	Allow customer to include notes for special accommodations and have these notes automatically viewable on roster		
1.0.23	Include customer account notes as part of an email		
1.0.24	Input global registration dates, session to session, for all classes/programs offered each session		
1.0.25	Browse activities and class availability online without requiring account log-in		
1.0.26	Ease of online search of activities by name, location, type, or activity code		
1.0.27	Add activities to cart online		
1.0.28	View cart online before checkout		
1.0.29	View customer account information and current enrollment online		
1.0.30	Allow to override activity maximum number of registrants		
1.0.31	Allow edit of class/program information copied from prior year		
1.0.32	Where possible allow customer to fill out forms online (waiver, facility/park reservation application, etc.)		
1.0.33	Option to reserve class/program location when creating class/program information (interface with the facility/field Reservations component)		
1.0.34	List prerequisites as part of activity information		
1.0.35	Subscribe to notification on waitlisted class: Notify if opening becomes available		
1.0.36	Staff notification if opening becomes available		
1.0.37	Allow customer to register for multiple family members without reselecting the household		

1.0.38	Suggest like classes to customer		
1.0.39	Scan document to customer's account		
1.0.40	Automatically notify staff of wait-listed classes and individuals		
1.0.41	Automatically email all receipts (not just those from online enrollments)		
1.0.42	Break number down by age groups/divisions by year of birth, rather than how old the participant is		
1.0.43	Incentive options (i.e., register/pay by certain date and receive a discounted fee, early-bird registration)		
1.0.44	Have rosters automatically default to the cell phone field		
1.0.45	If class is full, place customer on one global wait list		
1.0.46	Sibling discount ability and multi-child/week discount		
1.0.47	If class is full, place child on wait list but also offer closest class/program alternative		
1.0.48	System include search function - enabling system operators to easily and quickly find program details & information based on class/program criteria such as dates, times, ages, grades, locations, and codes		
1.0.49	Immediate access to re-print last transaction processed		
1.0.50	Allow multiple transfers in one transaction		
1.0.51	Notify staff if transfer creates an opening		
1.0.52	Activity registration - Tracking of attendance		
1.0.53	Ability to create Email list of Activity Roster, and subsequently add or delete additional Email address to the mailing		
1.0.54	Ability to create a CVS file from Activity Roster		
<b>2.0</b>	<b>Customer Account Options</b>		
2.0.1	Track customer transaction history		
2.0.2	Prevent further use and suspend account		
2.0.3	Waiver tracking		
2.0.4	Medical alerts/general alerts		
2.0.5	Store emergency contact information		
2.0.6	Track resident/non-resident by street address, not zip code		
2.0.7	Attach or remove a participant to a family		
2.0.8	Allow overrides of age/grade/gender/maximum enrollment		
2.0.9	Flag a customer account (i.e., for NSF's, alerts for child custody issues, etc.) include reason		
2.0.10	Consolidate/eliminate duplicate customer accounts		
2.0.11	Disallow customer to create duplicate account		
2.0.12	Disallow anyone under the age of 17 to create an online account and be allowed to pay with a credit card		
2.0.13	User friendly option to retrieve forgotten password online to access their customer account and register for a class/program		
2.0.14	Field to reflect current age based on birth date		
2.0.15	Field to indicate resident or non-resident status		
2.0.16	Payment plan option - Automated tracking of payment plan		
2.0.17	Field to indicate child's current grade level		
2.0.18	Set up customer user groups: Coaches/Instructors/Referees/Companies, Team Managers, etc.		
2.0.19	Scholarship tracking		
2.0.20	Show available scholarship dollars and credit on customer accounts		
2.0.21	Customer and staff can view family schedule		
2.0.22	Approve new customer account requests		
2.0.23	List cell phone as a required field when creating a new customer account		
2.0.24	Prompt for Email Address		
2.0.25	Indicate preferred contact telephone number		

<b>3.0</b>	<b>Customer Payment Options</b>		
3.0.1	Multi-payment deposit options		
3.0.2	Option to apply money on account/credit to new enrollment		
3.0.3	Allow customer to 'split' payment options (cash, credit card, money on account, etc.)		
3.0.4	Option to place money on account for future use instead of refunding back to customer		
3.0.5	Online payment plan option		
3.0.6	Accept money on account and gift certificates, as form of payment online		
3.0.7	Leave customer payee information blank for in-house registrations, rather than automatically defaulting to the last payee used for that participant		
<b>4.0</b>	<b>Excursion/Event Management</b>		
4.0.1	Ticket fulfillment system does not require individual name assigned to each ticket		
4.0.2	Ticket fulfillment system allows credit card payment		
4.0.3	Electronic ticket (bar code) with scanning system for remote transactions		
<b>5.0</b>	<b>Facility/Field Reservations</b>		
5.0.1	View multiple facilities (sites) for availability when booking reservation		
5.0.2	Automatically calculate and apply non-resident and discount fees to reservation		
5.0.3	Ability to generate a permit with customer/organization name, address, date contract issued, date contract printed, details of bookings including date, time, area, rental charge, etc.		
5.0.4	Not allow duplication/double booking of facility		
5.0.5	Block certain days for holidays and County closures to disallow facility reservation		
5.0.6	Reflect correct charges/dates/times on printed permit		
5.0.7	Prompt to reserve location/facility prior to issuing/charging for permit		
5.0.8	Allow for set up and clean up time		
5.0.9	Display reservations in a calendar in hourly, weekly, daily monthly formats		
5.0.10	Search facility by size, type of events, & times		
5.0.11	Date/time verification, from system, upon permit issuance		
5.0.12	User-friendly setup of Reservation fee charges. Ability to apply to appropriate rental areas		
5.0.13	Allow reservations of individual or multiple facilities/fields for a variety of dates and times. "One Shot" reservations (such as reserving for every Tuesday and Thursday on the first and third week of a month over a 12 month period, etc.)		
5.0.14	Allow for reservation of ancillary equipment with facility/field reservation (tables, chairs, etc.)		
5.0.15	Notify staff to changes in reservation status		
5.0.16	Scheduled/ auto-email calendar (weekly, monthly, yearly)		
<b>6.0</b>	<b>Financial</b>		
6.0.1	Payment method options: cash, check, credit card, gift certificates, coupons, payment plan, money on account		
6.0.2	Check payments: fields to require check number and optional drivers license information		
6.0.3	Allow for registration sites to process separate daily closeouts		
6.0.4	<b>Integration with Financial Accounting Management Information System</b>		
6.0.5	PCI compliance		
6.0.6	Allow fees to be linked to multiple GL accounts		
6.0.7	Transfer funds within a transaction after payment has been applied		
6.0.8	Require Security Code on credit card transactions		
6.0.9	Zip code verification/credit card security features		
6.0.10	Encryption on credit card numbers (show last 4 digits only)		
6.0.11	Credit card refunds to charge back to original card		
6.0.12	If data migration is chosen; transfer money on account to new registration management system		

6.0.13	Load money to a gift certificate		
6.0.14	Allow for percentage calculation for instructor payments		
6.0.15	Offer payment or installment plan		
6.0.16	EFT		
6.0.17	Method to track revenue generated from activities not yet started		
6.0.18	Audit voided transactions and who performed the void		
6.0.19	Apply funds to customer account/ allow credit balance refunds		
<b>7.0</b>	<b>League Scheduling</b>		
7.0.1	Effective method for managing "round-robin" and tournaments		
7.0.2	Capability to track and maintain individual team & member statistics		
7.0.3	Email and post schedules/standings/rosters on web		
7.0.4	Create league and coach/division specific email lists		
7.0.5	Design full leagues (schedules, standings, and rosters)		
7.0.6	Calculate team record and winning percentage		
7.0.7	Allows manual adjustment to a league schedule to meet any special requirements. Allows for any adjustments to any game in the schedule		
7.0.8	Provides for the scheduling of any number of leagues with normal regular season, round robin, & single/double elimination		
7.0.9	Allows for creation of tournament brackets at the end of the regular season based on league standings		
7.0.10	Provides ability to cancel games and then reschedule		
7.0.11	Produce league team rosters		
7.0.12	Automatically reserves/books facilities during the schedule generation process		
7.0.13	Allows an unlimited number of officials/referees to be set up & tracked with qualifications, exemption times, and pay rates entered		
7.0.14	Allows multiple officials/referees to be assigned to a league		
7.0.15	Produce officials/referees schedule reports		
7.0.16	Team Management – Ability to separately print teams included under a single Activity as rosters as well as attendance sheets		
<b>8.0</b>	<b>Marketing</b>		
8.0.1	Create email list from roster (email list of current enrollees in the activity is required, option to create email list of current and prior enrollees is desirable)		
8.0.2	Send out email blasts to all, or a select list, of customers, including the ability to include an attachment (i.e., a class/program flyer)		
8.0.3	Email class/program evaluations to customers, and an option to include additional information, if necessary		
8.0.4	Create group email lists		
8.0.5	Allow for HTML emails (color, layout, etc.) or option to send text only		
8.0.6	Allow customers to unsubscribe from email list and text notifications		
8.0.7	Text messages to cell phone (select groups, all users)		
8.0.8	Subscription lists		
8.0.9	Send out email reminder to participants before class/program begins		
8.0.10	Social Media integration – i.e. notify Facebook friends of registration for class with link to enrollment		
<b>9.0</b>	<b>Membership</b>		
9.0.1	Sign/sell multiple pass types for one customer (multi-site)		
9.0.2	Membership options to sell number of visits or by date range		
9.0.3	Allow to add card holder picture on membership card		

9.0.4	Audit of membership card holder usage by facility		
9.0.5	Check-in/check-out options for daily attendance tracking		
9.0.6	Search membership by keyword (lap swim, annual membership, etc.)		
9.0.7	Option to customize membership cards (graphics, logo, etc.)		
9.0.8	Automatically renew membership on existing card		
9.0.9	View memberships in descending order (newest membership first)		
9.0.10	Automatically calculate & apply non-resident, seniors, discount fees to membership		
9.0.11	Customer information and emergency contact information easily accessible from main Membership screen		
9.0.12	Be able to have real time tracking of individuals in a facility		
9.0.13	Mobile hand held functionality (permission slip scanner, signature pad, etc.)		
9.0.14	Online membership sales and renewal		
9.0.15	Scan capability for membership signatures and parental permission on field trip waiver		
<b>10.0</b>	<b>Point of Sale</b>		
10.0.1	Point of Sale function		
10.0.2	Track inventory for merchandise/equipment sales		
10.0.3	Set up by category (i.e. program or site) and sub categories (i.e. item or drop-in program)		
10.0.4	Prompt user about quantity and price before moving to payment screen		
10.0.5	Option to input customer information for check/credit card payments		
10.0.6	Manual price change (sales, discountable) functionality		
<b>11.0</b>	<b>Project</b>		
11.0.1	Dedicated vendor project manager		
11.0.2	Realistic project schedule		
11.0.3	Beta testing before going live		
<b>12.0</b>	<b>Reporting</b>		
12.0.1	Activity Registration - Print and reprint receipts		
12.0.2	Activity Registration – Class/Program roster/Attendance sheets: Ability to sort, alphabetical order, enrollment date, brief, expanded with payment, add multiple (more than two) custom field (name, DOB, phone, email)		
12.0.3	Activity Registration - Research/lookup retired activity participant registration information		
12.0.4	Activity Registration - Waitlists		
12.0.5	Activity Registration - Comparison reports: (i.e., Mail-in/walk-in vs. online registration, resident/non-resident)		
12.0.6	Financial - Daily Closeout Report Options (summary and detail)		
12.0.7	Financial - Account distribution (summary and detail)		
12.0.8	Financial - Net Revenue reports (summary/detail, monthly/yearly)		
12.0.9	Financial - Refund reports for specified date ranges		
12.0.10	Financial - Ability to sort by department , site, GL account, payment type		
12.0.11	Financial - Audit trail to show which user made each accounting transaction		
12.0.12	Financial - Track upcoming payment plan due dates		
12.0.13	League Schedule - Printing team/league schedules		
12.0.14	League Schedule - Number of teams registered for each league night/division/team		
12.0.15	Membership - Usage reports (i.e. summary and detail)		
12.0.16	Membership - Sorting Abilities (i.e. membership date sold, membership numbers, pass numbers, etc.).		
12.0.17	Membership - Choose criteria to report on (i.e. package category, usage date/time, membership start date, membership expiration date, sale renew date range, member, pass #, residence, transaction site, auto renewal type, current memberships only, expired memberships, suspended memberships)		

12.0.18	Membership - Audit facility use by age during specific time frame		
12.0.19	Point of Sale - Revenue reports sorted by GL accounts		
12.0.20	Point of Sale - Merchandise/equipment inventory		
12.0.21	Facility/Field Reservation - Break down of total reservation count/view multiple months in one report		
12.0.22	Facility/Field Reservations – Track revenue by facility, date range, facility “type” and usage history by facility, date range, facility “type” Ability to split revenue between room rental revenue and permit (i.e. processing fee, additional equipment for event) revenue		
12.0.23	GL account breakdown		
12.0.24	Ad-hoc reporting		
12.0.25	Excel export		
12.0.26	Email capability for all reports - sent via Microsoft Exchange system		
12.0.27	Print labels (including non-email accounts)		
12.0.28	Print program information in standard file format for use in creating program brochures		
12.0.29	Print cell phone number on rosters as a default		
12.0.30	Standard system reports available that provides demographic and statistical information for program sessions, categories, types, ages, genders, etc. . Ability to export report to Excel format		
12.0.31	System provides for a customer/patron schedule print (preferably in calendar format) that displays all program registrations for customer/family with enrollee name, date, and location of program		
12.0.32	Option to report on demographics for all aspects of the software application (18 & under, resident/non-resident, date/time, age, and community, etc.)		
12.0.33	Site-wide searches: Option to view data by site or globally, for all users, not just for a specific site		
<b>13.0</b>	<b>System</b>		
13.0.1	Include custom text/logos on receipts/reports		
13.0.2	Option to view data by site or globally		
13.0.3	User security levels: financial transactions, access to payment plan, credit card voids, etc.		
13.0.4	Login credentials verified by LDAP (Microsoft Active Directory)		
13.0.5	Unlimited user connections.		
13.0.6	Must be compatible with Windows 7 or higher operating system		
13.0.7	Web based application		
13.0.8	Accessible via all web browsers (i.e. Firefox, Safari, Internet Explorer, etc.)		
13.0.9	Multi-user system		
13.0.10	Password encryption		
13.0.11	Deactivate staff account		
13.0.12	Accessible via mobile application/mobile phone		
13.0.13	Online help		
<b>14.0</b>	<b>Technical Support</b>		
14.0.1	Responsive software technical support via toll free telephone number/e-mail/online with after-hours support		
14.0.2	Tiered levels of user access to technical support (i.e., end user, administrative, etc.)		
14.0.3	Notification of updates and enhancements		
14.0.4	Installation Assistance and Training provided for updates and enhancements		
<b>15.0</b>	<b>Training</b>		
15.0.1	Software manuals available for training purposes		
15.0.2	Training/Testing database - ability to test transactions offline (hidden from public website)		
15.0.3	End User/Power User/Administrator training		