

Outline of Software specifications

The primary goal of this project is to deliver a high quality SaaS application to manage the administration enrolments for Dance Studios globally. A strong focus is to be made designing and developing an attractive and easily used user interface that allows client/users to have quick access to key modules within the application.

There are many competitors already vying for their place within this market, but research and experience operating a business within the industry has highlighted key areas within many of the currently available platforms that could be improved upon. These areas include an easily operated scheduling module, extensive billing and discount options, better multi location support, SMS and email marketing integration, user interface improvements and greater flexibility in the online payment options available to studios globally.

This project also includes the design and development of a front end website. Use Mindbody and iclasspro (below) for a guide to complexity of the entire project.

When investigating functionality and examples of software features the following websites can be used for reference:

[www.mindbodyonline.com](http://www.mindbodyonline.com) - Arguably the best product currently on the market but lacks in multi location flexibility particularly on a pricing stand point. Billing option for accounts and classes is not specific to the dance industry and can be improved.

[www.jackrabbit.com](http://www.jackrabbit.com) - Very feature rich product with an aging user interface.

[www.thestudiodirector.com](http://www.thestudiodirector.com) - More basic features with a very dated user interface and limited global payment gateway integration. Has a very good class scheduling structure and billing of accounts by user defined billing periods(well used and research for this project)

<http://www.thinksmartsoftware.com.au/dance-overview/> - (DanceBiz)

A well structured program relatively new to the market. Australian based with moderate user interface. (limited review of this product)

<http://www.iclasspro.com> A very good product for comparison. This is the level of product we are trying to emulate.

<http://www.mainstreetsites.com> A very good product for comparison.

The website/software programming requirements detailed but not limited to the following documentation:

Please review under strict confidence.

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## Overview

* Student & Family Management
* Step by step Setup module
* Class Management
* Instructor Management
* Billing & Accounts Receivable
* Executive Dashboard with bar charts
* On-line registration
* Integration into your existing website Electronic Payments - e-commerce
* QuickBooks/MYOB interface
* Multi location support
* Comprehensive Security
* Multi country location and currency formatting
* Time zone setup functionality
* SMS integration

## Executive Dashboard

* Aged Accounts Reporting: Under 30, 30-60, 60-90 & 90+ Past Due balance family listings can be shown with one click
* Instant real-time Alerts for: Waitlists, Absences, Scheduled Trials, Birthdays in the next 10+ days.
* Online registration counter: Under the Key Metrics section updates with online registrations for the past 7+ days
* Active Counts for Students, Families, Classes & Instructors
* Compare revenue totals using weekly, monthly, location, terms, season filters trailing revenue bar chart
* See enrollment totals by class category in a colorful pie/bar chart
* Clients can Post Announcements using different colors and fonts for staff
* Create your own "To-Do List" in the Tasks area, and keep track of completed tasks
* User definable thresholds
* Every time management logs in critical performance indicators are displayed on the first page Indicators include: enrollment, class efficiency, drops, profitability and age accounts   
  Easily drill down to quickly see detailed information

## Student & Family Management

* Unlimited # of students per family
* Unlimited # of contacts per family
* Visual Scheduling: Daily, Weekly, Monthly Calendars
* Student Info Sheet Report includes emergency and allergy info for quick reference on the go.
* Family info includes: address, referral, lead source, special discounting (scholarship, hardship, employee) & unlimited notes
* Contact info includes: name, relationship, emails, work, home, cell phone numbers, address, login authority, billing flag, unlimited emergency contact(s) & unlimited notes
* Billing info includes: delivery type: email, snail mail or both, credit card, special discounting (scholarship, hardship, employee, multi class etc)
* Student info includes: age, birth date, gender, school, grade, phone, email, active flag, date started, date quit, current enrollment, past enrollment, medications, primary doctor, disabilities, special needs, allergies, skill level tracking, unlimited skill notes, instructor feedback notes, absences/make-ups, emergency form flag, picture, special notes to appear on class roll.
* Student measurements/sizes tracking: uniform size, martial arts belt size, t-shirt, leotard,pant, dress, shoe, height, waist, girth, bust, chest, inseam, sleeve, neck, hips & unlimited notes
* Easily email to all students and/or parents/contacts

## Class Management

* Enrollment Reports: Track current enrollments and enrollment history for any student in clients database
* Class Roll Report: Pull a detailed class roll including home phone number & balance info, with class meeting dates printed on roll
* Student Info Sheets: Pull a quick-reference sheet for each student per-class: can include emergency, medical & allergy information. Great for field trips and to keep in-classroom for emergencies.
* Enrollment Snapshot Reports: Forecast potential revenue numbers based on max class size and current tuition rate
* Email Templates: Email classes using HTML or Plain Text templates
* Sign in/Sign out sheet: This report allows you to select multiple classes and combine students on to one report in last name order and track the time in / out and authorization for drop-off and pick-up. This can also serve multiple purposes such as a master student list (without any sensitive information), a multi-class sign-off sheet for parents or teachers, when you need to get a written authorization signature.
* Copy Session Tool: Ability to copy a Session/term (billing period) of classes, and maintain enrollment from previous session/term
* Archive Classes Tool: Allows you to store classes that have completed, mass drop students, and restore classes later including previously enrolled students if needed
* Absence and Makeup tracking: Date absence, eligible for make-up, unlimited notes, make-up date & class
* **Class info includes**: location, name, description, status, tuition, days of the week, room, gender, min & max age, current size, max size, wait list, start & date; duration; display on public website flag and allow online registration flag
* **Tracks**: current and past enrollment, absences and make ups, waiting list, instructors & unlimited notes
* Transition from one Session/term to another smoothly with the Copy Session and Archive tools
* "Per day" class type: can be used for camps and classes that meet multiple times per week and allows per-day enrollment
* Ability to email a class: students and/or parents and/or instructors
* Ability to drop all students from a class
* Ability to easily enter all absence on one page for a class
* Closing out Seasons: At a date specific time the ability to role over a year/season accounts with the closing balance moved to the next year/season. Old seasons are archived, accessible and store within the software for future reference.

## Email/SMS Features

* Fully functional email with group emailing for accounts, newsletter and general information Newsletter functionality
* Create & Save Email Templates in HTML or Plain Text
* Advanced filter options for customizing information sent and client status
* Email families based on active status, category of class enrolled
* Email families individually or email whole classes & groups
* Email instructors: Great tool for finding a last minute substitute
* Email Statements with your logo: Ability to Filter Transactions by: Date, Transaction Type,   
  Paid/Unpaid Ability to Display Student(s) names and birthdays
* Automatic Email to client and the parent confirming online registrations Manual check box
* Automatic Email to billing contact each time their card is charged Manual check box
* SMS groups or individuals with individual automated account information or other notes. Used for chasing up overdue accounts, notifying of a cancelled class etc. Utilize the unlimited SMS ability of most mobile plans via iphone and android etc

## Integrate Online Registration into clients existing website

* Online Registration & Customer Portal Log Reports: Track registration activity for families
* Registration information including all agreements & legalese is saved to the family's profile in software for walk-ins, and online registrations
* Electronic Signature: The web registration online form requires a Full Name to be entered by   
  the person agreeing to the Legalese. If you require portal users to agree to the Legalese   
  when enrolling in classes, a Full Name is required there also.
* Registration is Optional: Some clients want to use the Web Registration form to simply gather customer information and not allow them to actually enroll in a class. You can control this option from the web registration settings within the software.
* Preferred Registration: You have the option to prevent new customers from enrolling in a class via the web registration form. You also have the option of only allowing Active returning families to register through the Customer Portal.
* Color-Match the Online Registration areas to clients website: Customize the Web Registration form background color and clients Customer Portal. This will help tie all of the customer-facing web features together matching their website-logo colors. Give client registration form a custom background color and change field labels font, size and color. Legalese text is not affected.
* Easily integrate real-time class openings into clients current website
* Clients control which class openings display on clients website from within software
* Current and new students can be enrolled in classes via client website
* Registration form is completely secure (1024 bit SSL)
* Simple one page registration form for new customers
* Easily control the following verbiage from within OSM: transportation release, release of liability, assumption of risk, medical emergency, payment policy & signature text, registration message
* Option to require a valid credit card # or direct debit information
* Control which classes can be accessed from online registration from within software

## Customer Portal

* The most comprehensive and intuitive customer portal available in the industry
* To implement it only requires 1 line of HTML code on a web page
* Clients customers can login with their own User ID / Password to view their data.
* Based on what client allow their customers to do, they may: update contact information, emergency & medical information, change billing information, view recent statement, make a payment, register for classes
* Multiple Payment Options through the Portal: 1.Payment amount cannot be changed. 2. Payment amount can be changed. (default) 3. Parent can select which fees to pay (cannot edit payment amount field) 4. Parent can select which fees to pay and can edit the payment amount field.
* Parents can view student absences & make-ups, schedules, skills notes, and view current policies
* Custom login message per account, Also, general announcements in HTML to market other products / services.

## Customer Portal

* Family accounts have the convenience of paying with a credit card via a number of different payment gateways/options setup by the studios
* View statement information
* Update contact information, examples: email, phone numbers, credit card, student   
  information
* Instant automated confirmation by email that the class registration and payment were   
  successful.
* View absences and make-ups
* View skills and sub-skills

## Absence / Makeup Tracking

* Absences/Make ups report: show absences and make ups for any date range, including student and class information
* Turn on/off absence tracking
* If you use the Absence tracking, you can track make-ups with our dynamic calendars and reporting
* Easily check off by class who was absent
* Ability to track if the student is eligible for a make-up, notes, make-up class and make-up date.
* Absences/Make ups report: show absences and make ups for any date range, including student and class information
* You either track Absences/Make-ups or track Attendance. Eg: 1. Set by default the students are automatically marked as attending and you select those that are absent or 2. By default students are absent and are marked off each time attending a class.
* If the Absence tracking is used, you can track make-ups with dynamic calendars and reporting
* The user interface needs to make it easy check off by class who was absent
* Ability to track if the student is eligible for a make-up, notes, make-up class and make-up date
* Attendance Report: Pull an attendance report for any date range including session, student name and class information
* Attendance records can be inputted manually very easily with one click per attendance

## Event Management

* Online event registration for birthday parties, special events, parent night out and many other activities
* Allow clients to easily see available parties & events and sign up for them online
* Quick and easy integration into an existing website
* Display a dynamic calendar on client website showing only the parties/events that are still available
* To register for a party just click on the event on the calendar and a user definable registration form displays
* Registration Form may include any user definable question: picture, description, options, legalese, (balloons, inflatable’s, cake, etc.)
* Option to allow x number of registrations for an event like a Parents Night Out
* Option to require a credit card to reserve a time slot
* Once a reservation form is submitted, automatic email notifications go to the person who   
  signed up for the event and the appropriate staff
* Easy setup of recurring weekly events, indicate start and end date
* Ability to view all party-events and/or available party-events

## Private Lessons Management

* Easily create similar private lessons with the Copy Class button
* Private lessons show on the internal weekly calendar with the student's name (optional)
* Online private lesson registration
* Allow clients to easily see available lesson slots and sign up for them online
* Quick and easy integration into an existing website in just minutes
* Display a dynamic calendar on your website showing only the lessons that are still available
* To register for a lesson just click on the event on the calendar and a user definable   
  registration form displays
* Registration Form may include any user definable questions
* Option to allow x number of registrations for a lesson
* Option to require a credit card to reserve a time slot
* Once a reservation form is submitted, automatic email notifications go to the person who   
  signed up for the event and the appropriate staff
* Easy setup of recurring weekly lessons, indicate start and end date   
  Ability to view all lessons-events and/or available lessons-events

## Recital/Concert Management

* Multi-Recital Report: View the performances of the students by family across multiple   
  recitals
* Print Detail Report: View a listing of the performances, songs, length, etc as well as the   
  students performing within each performance
* Print Family Detail Report: View the recital with a breakdown per family, showing each   
  student, their performance title and length
* Print Summary Report: List the performances within a recital including total student count
* Classes can be assigned to multiple recitals at one time
* Students can be marked as to not participating in each recital
* Data tracked per recital per performance: order position and the class may be in the same   
  recital multiple times
* Data tracked per recital per performance: song title, length - mins, secs
* Conflict criteria includes: # performances between each student’s performance

## Costume/Apparel/Item Management Feature

* The software should have a Costume/Apparel/Item module that will save a tremendous   
  amount of time when it comes to managing vendors & size charts, measurements,   
  costumes/uniforms/apparel and generating & tracking vendor orders.
* Vendors/Size Charts - The ability to setup client apparel suppliers information and their   
  specific size charts.
* Sizes/Measurements Worksheet - A printable worksheet used to gather measurements and   
  sizes.
* Sizing - Use the auto-size feature (which is based on girth) only or manually assign sizes.
* Vendor Orders - Create & track vendor orders that aggregate the apparel sizes.

## Instructor/Teacher Management

* Color-Coded Instructor Time Scheduling: Ability to include dates and times that   
  instructors are unavailable, pulls into the Daily Calendar
* Instructor info includes: name, status, type, 3 position(s), birth date, home, work & mobile   
  phone, email, emergency contact info, classes taught, wages info, feedback,   
  certifications, certifications date, certification notes, background, unlimited notes & picture
* PDF printable instructor schedule
* Instructor phone listing
* Email Active or Inactive instructors

## Billing & Accounts Receivable

* Find your Top 100 Customers: This feature allows clients to quickly view their Top 100 Customers by revenue.
* Advanced Transaction Searching:
* Powerful reporting features help clients find unpaid fees and E-payments. Search unapplied payments (pre-payments or overpayments with some amount remaining). Search fees not fully paid (applied) by a payment. The search results include the discount amount, totaling at the bottom of the page.
* Aged Accounts & Aged Fees Report: Look for families with outstanding balances and check for unpaid fees quickly
* Payment Summary & Payment Method Summary Reports: Revenue totals for any date range by payment method
* Paid Fees Summary Report: Track paid fees that are totaled by class Category
* Advanced Transactions Search: Powerful search tool for unapplied payments, partially paid fees, and all transactions
* Transactions Summary Report: Just want totals? This report gives totals for both credit and debits, for all types of transactions, broken down further by each location in clients system.
* Accounting Program Report & Export
* Organization Time Zone Setting: World time zone settings for client accounts. Financial transactions and enrollment records are recorded with the correct date. Once clients set their organization's time zone, time zone will be fixed for future transactions.
* Fast Receipt Printing: Receipt Printing options on the Payment screen and the Edit Transaction Windows. Clients can print a receipt by checking the "Print Receipt" option on the payment window. If they forget to check that option, they can go to the Family's Transaction Listing anytime and click on the Print Receipt button.
* Email Statements to families with flexible options for showing transaction history. Also include a “Pay Now” link
* Automated assignment of recurring charges
* Multiple billing, split payment, discount, late fee, and payment options
* Paper and/or electronic billing presentation capabilities   
  Fast, accurate assignment of receipts to Customer accounts   
  Electronic payment capability (Bank Drafts or Electronic Funds Transfer)
* Integrated Credit Card processing capability
* Detailed cash flow and account aging reports.

## Electronic Payments -­‐ e-­‐commerce

* Front end site to use payment gateway (provider to be confirmed) for client accounts. Full integration is required
* Application site is to have an easy plug in module for various payment gateways including but   
  not limited to PayPal, Camtech, Safeway, Epath and other major providers
* The software should also cater for a shopping cart ecommerce facility. The shopping cart can   
  be viewed from the client website or from within the application with the option of having   
  items buy/pay now only or add to family account

## Multi location support

* Unlimited # of locations/facilities
* All Report data can be exported to Excel with one click
* Easily configure each users' permission to each location
* Location data can not be accidentally co mingled (enrolled a student from Houston into a   
  Dallas class)
* Reporting can be selected on the location or organization level

## Comprehensive Security

* Multiple levels of access permissions
* Permissions can be based on software feature, location access or category of classes
* All communication between the end-users web browser is SSL 1024 encrypted
* All sensitive billing information is encrypted in the OSM database

## Family/Accounts Reports

* Advanced Family Search: Search for families using multiple criteria including active or inactive status, class session enrolled, user definable class categories, e-payment schedules, membership types, source, billing settings, number of children enrolled
* Customer Portal Log: Monitor family activity in the secure customer portal. This report allows you to have an overview of your portal activity and recognize if there is information that needs attention
* Email Listing Report: Use this report to gather and export a listing of all parent and student email addresses. Great for finding who a bounced email address belongs to. This report can be exported to Excel
* Family Address Listing: Find home addresses, phone numbers, email addresses and source info for families
* Family Epayment Listing: A listing of all families set up with ecommerce billing options. This means you can produce a list of families by e-payment type, e-payment Schedule, Credit or Card type. You can also search Missing or Expired Credit Card Expiration dates
* Family Listing: A report used for listing families for phone calls, totals, late fees and much more. Selection criteria for this report includes: family, city, state, zip code, balance range, type, last updated, date imported, contact's work and cell phone
* Family/Student Mailing Labels: Print labels on Avery 5160 mailing labels for sending statements or print student labels for birthdays or class use.
* Source Report: The system scans families for “How did you hear about us” answers, and totals the numbers for each Source (newspaper, Ad, Web, Friend, Referral) in this report, so that you always know which marketing methods work
* Zip Code Report: This report shows a breakdown of enrollment by zip/post code
* Detailed discount options for multiple classes or students

## Student Management Reports

* Advanced Student Search: Search for students on multiple criteria including active or inactive status, school, gender, age, class session enrolled, user definable class categories, registration month. This report also has the option to include emergency, size and user definable field answers
* Absences-Makeup Report: Find absences by date, including additional notes, makeup eligibility, and makeup class if scheduled
* Birthday Report: Search for students by birthday, age and birth month. Report pulls in birth   
  date, current classes enrolled and family contact info including email and phone numbers
* Student Listing Report: A very detailed report, includes most details available for a student,   
  also includes family contact and emergency information
* Costume Size Report: This report lists student costume sizes by class, session, etc. The   
  fields in this report are pulled from the Students page, Sizes tab
* Skills Search: Gather a listing of student skills and sub-skills by class

## Class Management Reports

* Advanced Class Search: Use this powerful search to find a listing of classes that match any   
  criteria entered into the search page
* Visual Weekly Schedule: See all of your classes in a dynamic weekly calendar format.   
  Visual Monthly Schedule: See classes and availability in a monthly calendar format   
  Daily Room View: View what classes take place for any day in the rooms at each facility   
  Costume Size Report: Find all student measurements entered per-class   
  Drop History Report: Monitor class retention, search for drops within any date range
* Enrollment Detail Report: The Enrollment Detail Report can be an excellent report to supplement the class rolls and drop history report. Fields displayed include: student phone, email, contact phone, email, emergency contact, student medical fields, special needs, immunizations, transportation, grade level, and user-definable field answers
* Enrollment Snap shot : These reports are a snapshot of the current class size, multiplied   
  with the current tuition fee for each class to give a current and projected view of tuition.
* Instructor Time Report: This report allows you to pull a listing of an instructor’s time based   
  on the classes they are assigned to and the duration field found on the class page
* Online Registrations Report: This report displays the most recent online Class Web registrations from client website.

## Event Reports

* Event Detail Report: View a student listing for the event including date, time and instructor   
  info. This report also includes the parent phone number
* Event Online Registrations: Pull a list of online Event Registrations for client organization   
  Multi-Recital Report: View the performances of the students by family across multiple   
  recital
* Print Detail: View a listing of the performances, songs, length, etc as well as the students   
  performing within each performance
* Print Family Detail: View the recital with a breakdown per family, showing each student,   
  their performance title and length
* Print Summary: List the performances within a recital including total student count

## Transaction Reports

* Advanced Transactions Search: Allows clients to select from a wide variety of transaction Search Criteria. This is very useful when reconciling Revenue Reports or searching for specific transactions or listing e-commerce payments
* Aged Accounts: Find families with past-due balances
* Aged Fees Report: View which fees are past-due with a family subtotal
* Deposit Slip Report: View payments for any date range organized in a detail view by   
  payment method
* Paid Fees Summary: View all paid fees for any date range. Also includes tax on paid fees
* Payment Method Summary: Just need totals? This report provides just the totals for   
  payments gathered, organized by payment method
* Revenue Summary: This report displays the revenue generated and class details based on   
  the current enrollment
* Transaction Listing: This report scans clients database and brings back details on any type   
  of transaction in their system. Open search fields allow clients to cater what types of   
  transactions to look for
* Transaction Sub Type Listing: This report scans clients database for transaction   
  information, but also delivers sub-type details as well
* Year to year comparison report: The ability to compare multiple seasons and locations

## Server

Client data is their biggest asset and their business relies on it every day. They need to make sure the daily operations of the system are sufficiently resourced and managed in a way that secures their data and ensures it is always recoverable.

## Highly Secure

The security of client data is of utmost importance to us. Your hosting centers should include fully redundant, state-of-the-art denial-of-service firewalls and we run SSL acceleration hardware to give the same performance whether you connect under regular or SSL encryption mode. Our provider needs to contain numerous system administrator controls to restrict access to data and functionality. All access to the Online Studio Manger system requires user authentication, which is to be done under 128-bit encryption, and the data is to be fully secured on protected servers.

## Safe Backup

We require a strict backup regimen to make sure clients data is always protected, multiple

backups are run every day. This means even in the unlikely event of a catastrophic failure, there's no need to worry about our clients data.

## Technical Support

Negotiable.

## Data Import / Export

Data import and export. The Online Studio Manager needs to have an import feature that allows clients to import account and contact data as needed, including files downloaded from other databases such as CSV and excel etc. They can also use it for bulk import for the first time they migrate data from another lesson/class management system. Exporting data should also be easy.   
Clients can save data from Online Studio Manager right into an Excel file. Of course they will want   
to protect their data, so administrators can set up policies for who can see and share what data.

## Hosting / Marketing website

The software will be marketed through a website (Front/back end) that is to be developed alongside the application. The website will need to handle enquiries, trial periods, monthly subscriptions, SEO, credit card processing, email marketing, video tutorial, customer support and other maintenance features for the ongoing operation of the software. A comprehensive content management system will be incorporated into the site. Communication between the application site and the parent site will be required for tracking student numbers and subscription dates etc.

Notes: