
@course manager : feature list

Course Scheduling

- Manage multiple course types including Classroom, NVQ's, QCF, Web or e-learning
- Create course outlines and sessions
- Create schedules weeks, months, years in advance
- Set parameters such as max/min number of delegates, duration, cost and pre-requisites
- Clone previously created events in seconds
- Allocate resources and costs
- Powerful course scheduling and availability reporting

Administration

- Auto generate and send documents including booking confirmations or joining instructions
- Generate certificates, registers and sign in sheets
- Schedule email or SMS reminders
- Course date check lists, tasks and reminders
- Mark course attendance, progress and scores
- Attach document and notes to courses or customers

Online Booking

- 24/7 online booking access
- Integrate course booking with corporate website
- Real-time course and event information displayed
- Offer secure online payment and e-commerce
- Shopping basket

Booking Management

- Quick and easy processing of bookings by sale or administration staff
- Process telephone, email or fax bookings
- View and manage all bookings – confirmed, provisional and waiting lists
- Automatic checking of pre-requisites
- Group bookings
- Manager approval loop
- Waiting list management
- Provisional booking functionality
- Synchronise with Outlook calendars
- Real time reporting on booking and sales

Financial Management

- E-commerce
- Shopping basket
- Auto generate and send invoices
- Edit and amend invoices
- Track Payments and auto send reminders
- Manage transfers, refunds, partial payments and cancellation fee's
- Integration with leading accounting software e.g. Sage
- Track all income, expenditure and viability
- Manage pricing and discounts schemes
- Manage multiple currencies
- Powerful financial reporting

Resource Management

- Create an inventory of resources including trainers, venues and equipment
- Manage external suppliers and resources
- Map resources to your course portfolio
- Diary management e.g. trainer holidays, downtime, internal meetings
- Search for available resources
- Inbuilt conflict detection
- Track resource costs and course viability
- Automate and send trainer communications
- Trainer availability request
- Trainer login – access sign in sheets, update availability or edit attendance
- Powerful reporting functionalit

Marketing & CRM

- Track and leads and enquiries
- Track and report on sales pipe line
- Track lead sources
- Link opportunities to customers, courses or course dates
- Track communication and notes
- Powerful CRM reporting

Email Marketing

- Craft rich, engaging emails
- Customise email templates to match your organization's branding
- Comply with the Spam regulation by providing a one-click opt-out option
- Email invitees a link to all upcoming events versus a link to each event one at a time
- Create tailored mailing lists based on previous enquiries, bookings, geography etc.
- Import existing mailing lists
- Personalise communication with mail-merge fields, such as name, company, and event related fields to increase relevance to recipients
- Track email open rates, links clicked and sales
- Schedule dates and times to send automated confirmations, reminders, feedback forms and post-event messages

Evaluation

- Custom form builder
- Pre, Post or trainer evaluations
- Automatically distribute via email based on pre-defined criteria
- Build a bank of reusable form items
- Check box, radio button or free text responses
- Online completion
- Powerful drill down reporting and filtering

Customers and end users

- 24/7 access from any internet enabled device
- Register or update account detail
- Browse and search course catalogues
- View real time course availability
- Easy online booking and payments
- Review approved training schedule and booking details
- Access training and booking histories
- Complete course evaluation questionnaires
- Multi language support

Customer Communication

- Automated, personalised customer communication
- Receive automated reminders, notifications and confirmations
- Receive auto reminders for award expiry and refresher training
- Send targeted email marketing messages
- SMS messaging

Reports

- 24/7 Real time reporting
- Standard or ad-hoc reporting
- Dashboard reporting
- Drill down reporting and filtering
- Graphical or statistical reporting
- Export reports to excel or PDF
- Email or schedule reports

Sample reports:

- ~ Financial reporting including income, expenditure and viability
- ~ Course and resource schedules
- ~ Highlight available, fully booked or undersubscribed courses
- ~ Course statistics including fill rates, attendance numbers, cancellations
- ~ Resource reporting including costs, utilisation, availability
- ~ Evaluation form reports
- ~ Outstanding invoices
- ~ CRM including open opportunities, forecasts sales

Managing Customer Information

- A single database containing all customer information
- View history including bookings, attendance, invoices, enquiries
- Manage candidates, companies, branches and hierarchy
- Automated capture of client data including bookings and communications
- Assign candidates to companies, users groups or job roles
- Create custom fields
- Store notes
- Candidate document store
- Powerful search functionality

Integration

- Integration with existing data systems
- Integration with leading accounting packages
- Integration with Outlook calendar
- Data import and export tools
- Seamless integration with corporate websites
- Integration with payment providers including WorldPay and PayPal