

ATTACHMENT B DETAILED SPECIFICATIONS FORM

Fill in this form and “Save as” with your company name in the file name e.g. ABC Company Attachment B.pdf

 Company Name (Trade Name)

 Date

Type the appropriate Yes (Y), No (N) or Other (O) and provide exceptions/comments as needed. An example of “Other” would be if a third-party is required.

Section A - General Software & Application Specifications

| No. | Requirement | Y | N | O | Exception/Comment |
|------|---|---|---|---|-------------------|
| A-1 | Software is a true web-based system. | | | | |
| A-2 | Software is hosted on Vendor’s server. | | | | |
| A-3 | Software provides customizable user rights. System Administrator will have the option to create and assign user groups based on job duties at any time. | | | | |
| A-4 | Software must be a multi-user system and allow for an unlimited users. If limited, please explain and provide pricing for additional users. | | | | |
| A-5 | Software allows for the System Administrator to control “read/write” or “read only” access to the various functions by each end user. This access can be changed by the system administrator at any time. | | | | |
| A-6 | Software must be able to integrate with the Town’s MUNIS financial software. | | | | |
| A-7 | The Vendor provides 24/7/365 support with secure hosting. | | | | |
| A-8 | Software has an on-line “Help” feature. | | | | |
| A-9 | Software must have a process to identify duplicate households/individuals during account creation. | | | | |
| A-10 | Software can identify residency status when creating new accounts. | | | | |
| A-11 | System allows users to access or register via smartphone, tablet or other and automatically resizes for these platforms. | | | | |
| A-12 | Software can integrate with the Town’s GIS system. | | | | |
| A-13 | Software is PCI compliant and the vendor can annually provide a PCI DSS Certificate of Compliance. | | | | |
| A-14 | Vendor will provide immediate notification if any data breach has been detected on any hosted system and will provide detailed information on what information has been compromised. | | | | |
| A-15 | Software offers the ability to have someone from outside the household pay for services. | | | | |
| A-16 | Software allows for split households such as in the case of a divorced or separated family. | | | | |
| A-17 | Vendor has full back up and restore functions as well as full system recovery capabilities. | | | | |
| A-18 | Software will allow the administrators to define how much | | | | |

| No. | Requirement | Y | N | O | Exception/Comment |
|------|--|---|---|---|-------------------|
| | history is retained and when it is archived. | | | | |
| A-19 | Software allows for remote connectivity to various “users” as defined by the System Administrator. | | | | |
| A-20 | All transactions, reports etc. in the system are in real-time. | | | | |
| A-21 | System can freeze accounts either temporarily or permanently for reasons such as non-payment for past services. | | | | |
| A-22 | System allows for staff to place notes on or track changes to accounts that can be seen based on user group. | | | | |
| A-23 | System provides capabilities to upload scanned documents (e.g. waivers, medical forms, etc.) to an individual in the database in a PDF or other format. | | | | |
| A-24 | System is capable of producing fillable forms that can be kept with the registrant to be used for future pre-determined program registrations. | | | | |
| A-25 | Software allows for mass emails or text for the entire database or via program and/or rental. Such emails can be sent with attachments. Is this a 3 rd party function? | | | | |
| A-26 | Software allows for staff to choose a customized web page layout based on different options provided by the vendor. Web layout can be customizable in-house using html. | | | | |
| A-27 | Software allows for remote connectivity using a personal computer, laptop, iPad and mobile phone for both on-line registration and for system administration. | | | | |
| A-28 | Software will “time out” a customer who has not completed an on-line registration in a predetermined amount of time. System administrator can define the amount of time. | | | | |
| A-29 | For all applications, the system will display electronic liability waivers, at the front desk and on-line where the customer has to “Agree” or “Disagree”. If the customer disagrees the registration cannot be completed. | | | | |

Section B - Activity Registration/Entry/Management

| | Requirement | Y | N | O | Exception/Comment |
|------|---|----------|----------|----------|--------------------------|
| B-1 | Activity data fields are to include the following elements: Activity Number, Activity Name, Season, Category, Instructor, Location, Activity Status (open, closed, etc.), Gender, Beginning/Ending Dates, Date registrations will first be allowed, Minimum & Maximum Age, Minimum & Maximum Enrollment Levels, Minimum & Maximum School Age, Prerequisite Activity, Instructor Payment data, Text Area for Catalog, Receipt Notes and Internal Staff Notes, Calculation & Storage of All Session Dates & Times, Enrollment Statistics, Denotation of which Mailing List are appropriate. | | | | |
| B-2 | Software will allow for “retiring” of enrollment data and rosters at the end of a season to allow for easy setup of the software to handle the upcoming season. “Retired” data is stored permanently in an historical file and is accessible for marketing purposes. | | | | |
| B-3 | Software will allow registration of participants into activities offered in multiple seasons at the same time, such as registration in both late Summer and early Fall programs. Software does not require one season to be closed before starting another. | | | | |
| B-4 | When operated with Facility Reservation modules, the software will automatically calculate all activity session meeting dates for the activity, and automatically allow for facilities to be scheduled and reserved at the same time that new activities are entered. Scheduling and reservations are to be performed without requiring duplicate data entry. | | | | |
| B-5 | Software allows integrated on-line registrations where the system can process on-line registrations and front desk registrations in real-time simultaneously. | | | | |
| B-6 | Software allows for all of the following types of refunds: credit card, check (via Accounting Department) or cash (in same day transactions) or a credit be stored on customer account. | | | | |
| B-7 | On-line registrations allows for customers to create their own password. | | | | |
| B-8 | On-line registrations allows for required fields be completed and some of those fields may not be changed without system administrators’ approval. | | | | |
| B-9 | Software will alert the customer (on-line) and front desk staff of any schedule conflicts based on programs enrolling for. | | | | |
| B-10 | Software will alert the customer (on-line) and front desk staff of when the customer is not meeting requirements | | | | |

| | Requirement | Y | N | O | Exception/Comment |
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| | such as class prerequisites or age/grade limits. | | | | |
| B-11 | Software will allow administrators to override requirements (such as age). | | | | |
| B-12 | Software will not recognize the customer is “enrolled” until payment is complete. | | | | |
| B-13 | Software will allow for waitlist to be formed when classes are full. The System can send alerts to the waitlisted participants if a refund has been issued. | | | | |
| B-14 | Software will provide receipts electronically via email to the household and printed if at the front desk. | | | | |
| B-15 | Software will allow for an unlimited amount of fees to be assigned for each activity. A separate revenue account can be assigned to each fee. | | | | |
| B-16 | Software will allow for pro-rated fees as determined by the system administrator. | | | | |
| B-17 | Refunds can be prorated as determined by the system administrator. | | | | |
| B-18 | System has the option to retain an “administrative fee” for refunds after a pre-determined date. | | | | |
| B-19 | The system will allow for mass registrations where a large number for on-line and in-office registrations will occur in a short time. (Example, first morning of registration.). | | | | |
| B-20 | System will produce reports such as, but not limited to, the following: <ul style="list-style-type: none"> • Master report listing all activities, descriptions, dates, times, etc. • Under minimum/maximum enrollment report. Full activity report. • Activity totals and statistics. Please provide samples of these reports and other report capabilities. | | | | |
| B-21 | Software produces rosters including the following options and data elements: <ul style="list-style-type: none"> • By Activity Number range or category such “Fall Swim Lessons”, entry order or alphabetical. • By specific revenue account, category, or instructor. • By specific date range. • By “brief” or “expanded” roster formats. • Printing mailing list from rosters. • Inclusion/exclusion by enrollment type (such as waitlist, refunded entries) Please list other options and data elements and provide samples of all roster types. | | | | |
| B-22 | Software produces Attendance Sheets, which include actual session meeting dates and a capability to “sign in” and “sign out”. Please provide samples. | | | | |
| B-23 | Software can also perform on-site electronic “sign in/out” capabilities via use of iPad or other portable computer. | | | | |
| B-24 | Software allows for question groups when registering for programs such as t-shirt sizes, menu options, etc. | | | | |
| B-25 | Software allows for optional donations during the registration process for all or specific programs. | | | | |

| | Requirement | Y | N | O | Exception/Comment |
|------|--|----------|----------|----------|--------------------------|
| B-26 | Software works with a PCI compliant third party merchant services (Credit card processing) vendor. If so, please provide information | | | | |
| B-27 | If a third party merchant services vendor is required, can credit card and other transactions go through the software seamlessly without having to switch between the software scree and the merchant services vendor screens. | | | | |
| B-28 | Software can process refunds, seamlessly, through the system without requiring a separate process | | | | |
| B-29 | Software allows for sharing with social media platforms such as Facebook, Instagram and Twitter | | | | |
| B-30 | Software can create separate URL's by program for individualized program registration. | | | | |

Section C - Facility Registration/Entry/Management

| | Requirement | Y | N | O | Exception/Comment |
|-----|---|----------|----------|----------|--------------------------|
| C-1 | Facility data fields are to include the following: Facility code/ID, facility name, center, facility type, opening/closing times for each day of the week, overlapping facilities, text facility notes, individual "skip dates" for specified facility, default permit disclaimer to use, minimum reservation time, denotation of whether the facility is open 24 hours/day, search keywords, denotation of which mailing list are appropriate for persons who rent facility. Please list other data fields included. | | | | |
| C-2 | Software to allow entry and management of multiple centers, facility types and facilities. Software will search for facilities based on any one or any combination of these same parameters. | | | | |
| C-3 | Software to produce reports of all centers, facility types and individual facilities. Software to produce a Facility Master Report showing all facilities and related information. | | | | |
| C-4 | Software to allow management of and produce reports of all "overlapping" facilities. Such as a soccer field grassy area that overlaps the outfield of a ball field. If the soccer field is reserved, the ball field is not available. | | | | |
| C-5 | Software allows for an unlimited number of mailing list to be created. And for the appropriate mailing list for a facility to be created at the same time the facility is created. | | | | |
| C-6 | Software to produce Facility Statistics report with the following elements: Center name, Facility type, Facility name. | | | | |
| C-7 | Software allows default charges to be entered for facility types and customer types, and allows individual/unique charges down to the facility level. | | | | |
| C-8 | Software allows new reservations to be entered, produces permit contracts (which are specific to said facility), and payment receipts, and prevents double scheduling of facilities. Please provide samples of permit contracts. | | | | |

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| | Requirement | Y | N | O | Exception/Comment |
|------|---|----------|----------|----------|--------------------------|
| C-9 | Software allows multiple facilities to be rented by a single customer in one step, without requiring multiple permits or duplicate data entry. | | | | |
| C-10 | Software provides a user configurable on screen scheduling calendar, which displays existing reservations and allows “point and click” selection of new dates and times to reserve. | | | | |
| C-11 | The “on screen” scheduling calendar allows the user to view multiple facilities at once by day, week, or month. Time increments may be as low as 5 minutes. | | | | |
| C-12 | The software allows reservations to be made up to 24 hours in advance on any given date. | | | | |
| C-13 | Software allows searching for unique keywords within specific facilities such as “Meeting Rooms”, but also specify that the desired room must have a Cable TV hook-up. | | | | |
| C-14 | Software has the capability to search for multi-day or multi-facility reservations, such as a customer who wants to reserve a meeting room from 1:00-2:00 p.m. from July 1 – 30 on Tuesday and Thursdays. After searching, the software will display a screen which shows how many dates were requested, which facilities were search, and which facilities were available for the dates requested. | | | | |
| C-15 | Software allows tentative reservations which may require approval by a supervisor. These reservations will expire and longer be valid when an expiration date is reached | | | | |
| C-16 | Software will allow “attachment” of one or more disclaimers along with each reservation that is processed. The software will allow multiple disclaimers to be entered and stored, with the text in the disclaimers being user defined. Disclaimer text will appear on Permit Contracts which are produced. | | | | |
| C-17 | Software will allow reservations to be processed for individuals, companies, or both. If a company is used, the software will allow entry of the contact person to contact. | | | | |
| C-18 | Software will track event name and number of persons attending for each reservation. After the reservation is complete, the event name is to be displayed in the scheduling calendar when viewed. | | | | |
| C-19 | Software will allow entry and storage of “standard” set-up instructions, which can be individually stored and customized for each type of facility. When a reservation is processed, the software will allow attachment of standard set-up instructions and allows entry of specialized or customized set-up instructions. | | | | |
| C-20 | Software to allow entry of rental charge data in the facility rental price list. And thereafter automatically price new reservations, including hourly charges, deposits, and more. Rental charge list can be specific to facility or customer type. | | | | |
| C-21 | Facility rental price list will allow for unique charges down to each facility, and allow for variable charges based on customer types such as resident, non-resident, profit, non-profit etc. | | | | |

| | Requirement | Y | N | O | Exception/Comment |
|------|--|----------|----------|----------|--------------------------|
| C-22 | Facility price list entries include identification and handling of deposit charges which shall be set to automatically be refunded back to the customer unless withheld for damages or other reason. | | | | |
| C-23 | Software to allow partial or no payment at the time of reservation, and collection of the remaining balance at a later date. | | | | |
| C-24 | Software allows collection of payment by cash, check, credit card, or “from account” if customer has a balance. Split payments can be accepted such as part cash and part check. | | | | |
| C-25 | Software will create payment plans for the customer. Payment plans can be calculated and created based on weekly, bi-weekly, and monthly plans. | | | | |
| C-26 | The software will notify the operator if they attempt to reserve: <ul style="list-style-type: none"> • A Facility that has already been scheduled for that date and time. • If requested date and time conflicts with “global’ dates restrictions. • A facility that is unavailable due to use of an “overlapping’ facility. • A facility that has a conflicting “individual” date a time restriction. | | | | |
| C-27 | Software to produce reservation permit contacts “on demand” or in batches. | | | | |
| C-28 | Software allows reservation inquiry by persons name or a facility name, and provides printed reports or “on-screen” review of all reservations. | | | | |
| C-29 | Software produces a master reservation report including all of the following options and data elements. All reservations for a specific center, facility type (meeting room), specific date range, specific customer, or combination of all. Please provide samples of said reports. | | | | |
| C-30 | Software produces graphical usage calendars in monthly, weekly, and daily formats. Usage calendars to be in day/week/month type format and to include the event name and beginning reservation time. Please provide illustrated samples of these. | | | | |
| C-31 | During reservation entry, a participant zip code may be entered and the corresponding city and state will pre-filled automatically. | | | | |
| C-32 | Software produces facility even set-up report for the maintenance staff, which includes all reservations for a selected date range and includes specific set-up instructions. | | | | |
| C-33 | Software allows for “internal” reservations by staff to book meetings without a fee. | | | | |
| C-34 | Software allows for a simple change in a customer’s reservation without having to issue a refund on the existing reservation. | | | | |
| C-35 | Software will allow multiple fees for the reservation such | | | | |

| | Requirement | Y | N | O | Exception/Comment |
|------|--|---|---|---|-------------------|
| | as a “refundable deposit fee” and the reservation fee. The fees can be assigned be directed to separate accounts. | | | | |
| C-36 | Using the example above, software can refunds the amounts of a specific fee code without affecting the status of the reservation. In this case, the refundable deposit can be refunded at the end of the reservation period. | | | | |
| C-37 | Software allows for online reservation requests with an approval process prior to confirming reservation. | | | | |

Section D - Membership/Pass Management

| | Requirement | Y | N | O | Exception/Comment |
|------|---|---|---|---|-------------------|
| D-1 | Software offers multiple levels and options for memberships with the ability to limit the number of members in a family pass. | | | | |
| D-2 | Memberships automatically designates fees based on residency status. | | | | |
| D-3 | Software allows pass duration to be customizable. (1 week, month, 3 months, etc.) | | | | |
| D-4 | Membership passes can require photo of the member and photograph is stored in the system. | | | | |
| D-5 | Software allows for bar-coded fobs to be scanned in upon entry. | | | | |
| D-6 | Software keeps track of member visitations based on location, date and time visited. | | | | |
| D-7 | System administrator can suspend a membership and specify a date range and reason for the suspension. | | | | |
| D-8 | Software can print reports on membership sales, passes scanned and detailed information on location with date and time the member scanned in. | | | | |
| D-9 | Software administrator can restrict ages for various types of memberships. (Example: Teen Center membership.) | | | | |
| D-10 | Software has the ability to require memberships for specific Activity registrations. | | | | |
| D-11 | System administrator can issue discounts for individual/household memberships based on financial need. | | | | |

Section E - Point of Sale

| | Requirement | Y | N | O | Exception/Comment |
|-----|---|---|---|---|-------------------|
| E-1 | Software offers touch screen and standard key board options. | | | | |
| E-2 | Point of sale is integrated with program registration applications. Can sell to an account on database. | | | | |
| E-3 | System administrator can set up user defined screens based on location/program. (Example: Daily pool admissions and pass sales only viewable by pool staff only). | | | | |
| E-4 | Software offers gift card sales. | | | | |

| | Requirement | Y | N | O | Exception/Comment |
|------|--|----------|----------|----------|--------------------------|
| E-5 | Software provides an option for on-line point of sale capability. | | | | |
| E-6 | Software offers inventory management. | | | | |
| E-7 | Software offers alerts when inventory thresholds are reached. | | | | |
| E-8 | Software can maintain inventory data such as quantity on hand, etc. | | | | |
| E-9 | Software offers full cash register/point of sale functionality. | | | | |
| E-10 | Software has the ability to provide customers with itemized receipts. | | | | |
| E-11 | Receipts are numbered sequentially to allow of the identification of transactions. | | | | |
| E-12 | Software allows for deletions (void) of a single item without having start the transaction all over again. | | | | |
| E-13 | Software can display cash transactions including balance owing and change to be returned. | | | | |

Section F - League/Team Management

| | Requirement | Y | N | O | Exception/Comment |
|-----|--|----------|----------|----------|--------------------------|
| F-1 | Software can accept registrations and assign players to teams. | | | | |
| F-2 | Software can schedule teams for league and tournament play. | | | | |
| F-3 | Software creates round robin play. | | | | |
| F-4 | Software can assign games to various system administrator assigned locations/fields, days and times. | | | | |
| F-5 | Software has the ability to reserve fields based on game schedules both manually and automatically. | | | | |
| F-6 | Software has the ability to enter and update scores. | | | | |
| F-7 | Software has to ability to make changes to schedules without changing the entire schedule. (Example: Rain cancellations.) | | | | |
| F-8 | Software has the ability to communicate to team members via email. | | | | |
| F-9 | Software can allow system administrator to give permission for coaches to have access to rosters information such as phone number, email addresses and emergency contacts. | | | | |

Section G - Finance and Reporting

| | Requirement | Y | N | O | Exception/Comment |
|-----|--|----------|----------|----------|--------------------------|
| G-1 | Software allows logging of staff to activity records, including activity dates, fees, accounts, etc. | | | | |
| G-2 | Software includes the ability to produce consolidated day end financial reports that provide consolidated totals from all functional areas. (i.e. activity, and facility reservations, POS sales etc.) | | | | |
| G-3 | Software includes the ability to create set up codes and reporting capabilities for separate Town departments within our oversight. | | | | |
| G-4 | Software offers customized reporting with user controlled | | | | |

| | Requirement | Y | N | O | Exception/Comment |
|------|--|----------|----------|----------|--------------------------|
| | “selection” screens prior to running each report. Selection screens allows the user to narrow the report specification choosing only relevant data. | | | | |
| G-5 | Software will allow all reports the ability to be previewed on screen, printed, saved to file, or output as Excel spreadsheet, HTML, or PDF files. | | | | |
| G-6 | Software can produce customer invoices and/or statements. | | | | |
| G-7 | Software can print mailing labels based on user defined parameters. | | | | |
| G-8 | Software has the ability to run detailed account receivable/payable reports to view system debits and credits. | | | | |
| G-9 | Software to produce all of the following “daily close” reports: <ul style="list-style-type: none"> • Cash receipt report, listing all receipts processed, payment type and totals. • Cash distribution summary, showing all payment distributions. • Account transfer report, showing funds flow amount revenue accounts. | | | | |
| G-10 | Software produces monthly and yearly repots similar to the daily close reports. | | | | |
| G-11 | Software can export daily close information into MUNIS or a MUNIS readable file in accordance to Town specifications. | | | | |
| G-12 | Software has the ability to view or print customer history of registrations, payments, transfers, withdrawals and refunds. | | | | |
| G-13 | Software allows for a creation of a scholarship fund as a form of payment. Funds are drawn from an account to process payment. | | | | |
| G-14 | Software allows for payment plan set up. | | | | |
| G-15 | Software allows for multiple person discount/fee waiver discounts. | | | | |

End of Text