Endeavour - Function List

Issue	01
Date	25th March 2024

No.	Function	Detail
GEN01	Cloud-Based, single instance multi tenant, Portal Solution	Endeavour is provided as a cloud-based service.
GEN02	Audit Trail	Any change to any field/record is captured in the audit trail - with user and datestamp
GEN03	Process Audit	A more detailed audit for significant processes. For example showing when Invoices and documents where sent to a customer for an Event booking.
GEN04	Searching	Simple and Advanced Search on all main system screens.
GEN05	Export to Excel	Data export to Excel for all major screens.
GEN06	Notes	Each main screen allows Notes to be recorded. Comments with user & datestamp on every main screen. Note can be categorised, have documents uploaded with them and be Searched and filtered.
GEN07	Automatic Emails	For example when an Event booking is made, a User account is created.
GEN08	Ease of use	A key objective of our system design is ease of use. All screens feature easy input and all staff are able to add records with minimal clicks and the system is easy to follow.
GEN09	API	Endeavour has an API allowing for integration with other systems
ORG01	Organisation	Maintain a list of Organisations with detailed information
ORG02	Organisation Key Contacts	Specify Key Contact roles for an Organisation
ORG03	Organisation Contacts with Role	Associate Contacts to an Organisation with optional Roles. Roles have optional From and To Dates.
ORG04	Organisation Addresses	Assign one or many addresses to an Organisation
ORG05	Organisation Finance	Record Finance information including customer discounts, invoices raised, payment taken and outstanding monies per Organisation
ORG06	Organisation Event Bookings	View Event bookings for the organisation
ORG07	Organisation Event Booking Message	Display message for Organisation when an Event booking is made
CON01	Contact	Maintain a list of Contacts with Detail and Advanced information - these can be delegates, booking contacts etc
CON02	Contact Roles	Assign optional Role to Contact with optional From and To date for Role
CON03	Contact Addresses	Assign one or many addresses to a Contact
CON04	Contact Event Booking Message	Display message for Contact when an Event booking is made
CON05	Contact Finance	Record Finance details including Contact discount, invoices raised, payment taken and outstanding monies
CON06	Sole Trader	Allow a contact to assigned to an Organisation and also be their own entity for the purposes of booking onto Events and Invoicing.
CON07	Contact Events	Show a clear list of events a contact has and will attend
CON08	Contact Certificates	Show a list of Certificates Endeavour has generated for the Contact
CON09	Contact 3rd Party Certificates	Ability to upload certificate attained with other Organisation and not generated by Endeavour
CON10	Contact Identifiers	Record an identifier for the Contact when associates with other Organisations.
CON11	Contact Enquiries	Keep a list of Enquiries for a contact. For example future course they are interested in attending.
CON12	Contact Marketing	Record marketing preferences for example contact via email, text etc.
LOC01	Locations and Rooms	Keep a List of Location, with Rooms, where training course are delivered.
LOC02	Room Capacity	Record room capacity to manage number of delegates that can be booked onto courses,
LOC03	Location Address	Record one address for the location.
COU01	Course	Maintain a list of the training courses with detail information; - Course duration - Maximum places - Trainer, Assessor, IQA, Observer, Independent Assessor. - Sampling Methods
COU02	Modules	The components of the course. Detail information includes; Level & Guided Learning Hours.
COU03	Course Modules	Assign modules to the Course. Modules can be defined as Mandatory.
COU04	Course Products	Assign Product(s) to a Course
COU05	Course Management	Publish a Course when ready for use on Events. Course Version; Ability to have old and current versions of the course. Copy Course option available.
COU06	Course Prerequisites, Exemptions and Entry Requirements.	Define Prerequisite courses with user configurable event booking check(s), error or warning, and allowable exemptions. Define non course based pre requisites with type of booking check (error or warning)
COU07	Course Finance	Record price with date range validity for price. Price can be per delegate or for the course as a whole. Discount for a Course. Record Nominal, VAT and Cost code for a course for sending to finance system.
COU08	Course Certificates	Certificates of Attendance, Achievement and Transcript (unit listing) per course. Word template documents with merge fields.
COU09	Course emails	Send email with attached documents when significant events happen including Course booking.

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EVE01	Events	An Event is when a course is run on specific dates.
		Course detail copied to the Event on Event creation.
EVE02	Event Products	Assign Product(s) for an Event, initially copied from Course
EVE03	Event Sessions	Sessions automatically created based on the Modules for the event
EVE04	Event Location	Where the Event is being run.
EVE05	Event Trainer	Assign a Trainer to an Event
EVE06	Event Bookings	Book delegates onto an Event, either via an Organisation or as a sole Trader
EVE07	Event booking Management	Via room capacity manage number of people allowed tube booked onto Event.
		Availability checks on Rooms and trainers.
EVE08	Event Booking - Bulk Import	Import Delegate booking(s) from file; create new Contacts as needed, with duplicate check for existing Contact.
EVE09	Event Booking - Block Bookings & TBC bookings	Allow multiple contacts to be booked onto an event where delegate details are TBC
EVE10	Event - Mark Delegates as Attended / Passed	
EVE11	Event - Generate Certificate(s)	Certificates of Attendance, Achievement, Transcript (Unit Listing)
EVE12	Event Booking Invoices	Raise invoice(s) for the Event booking
EVE13	Event emails	Send email to deletes with associate documentation for:
		- Event booking
		- Event Date change
		- Event location change
PRD01	Products	Maintain a list of product sold, some related to Events.
		For example training materials, handbooks.
PRD02	Product Finance details	Including cost price, list price & Nominal and Cost code for sending to Finance system
FIN01	Finance Invoice	Raise Invoice for an event.
		Invoice line per delegate booking, event product.
FIN02	Finance Payment	Take Payment and link to Invoice
FIN03	Finance Accounts Information	Record Cost & Nominal codes against invoice, credit note and product for sending to Finance system
FIN04	Finance Credit Notes	Ability to raise credit notes
FIN05	Finance Take credit card payments	
INT01	Integration to Finance System	Export Account data, Invoices and Payment to Finance system.
INT02	Integration to Parnassus	
INT03	Integration to Monarch	For Workflows, Tasks, Reminders, eForms
REP01	Reports	Set of standard system reports including Trainer Utilisation Report.
DOC01	Documents	Set of standard documents, including;
		- Booking Confirmation
		- Feedback forms
		- Chase Payment Letter.
		These can be done via email templates too.
Event Booking		
ADM01	Custom Setting manager	Login Page Message, Welcome Message, Landing Page.
ADM02	Document Template Manager	Including; Certificate templates, Invoice templates.
ADM03	email Template Manager	Including; Event Booking templates, User management templates.
ADM04	Fields Manager	Including; Set field label. Format, if filed is Mandatory, if filed is read only.
ADM05	Import Manager	Import data for Contacts, Courses, Event Delegate booking, Locations, Modules, Organisations
ADM06	List Manager	Manage the drop down lists in Endeavour
ADM07	Package Manager	Define Groups and manage which courses are sold as packages.
		A package is when a group of courses is sold at a discounted price.
ADM08	Setting	Set information for specific instance of Endeavour.
		Including; Address to show on invoice, Company VAT number.
ADM09	User Management	Manage the Users allowed to access Endeavour.
		Includes sending email of account details.