Endeavour - Function List

Issue	04
Date	September 2025

ENDEAVOUR

No.	Function	Detail
GEN01	Cloud-Based, single instance multi tenant,	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 date/time stamp
GEN03	Process Audit	A more detailed audit for significant processes. For example showing when invoices and documents were 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 & date/time stamp on every main screen. Notes can be categorised, have documents uploaded with them and be searched and filtered.
GEN07	Automatic Emails	For example when an event booking is made or when 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	Main Organisation with subsidiaries
ORG03	Organisation Key Contacts	Specify Key Contact roles for an Organisation
ORG04	Organisation Contacts with Role	Associate Contacts to an Organisation with roles. Roles may have optional From and To Dates.
ORG05	Organisation Addresses	Assign one or many addresses to an Organisation
ORG06	Organisation Finance	Record Finance information including customer discounts, invoices raised, payment taken & outstanding money
ORG07	Organisation Event Bookings	View Event bookings for the organisation
ORG08	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 associated 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 Locations, with Rooms, where training courses are delivered.
LOC02	Room Capacity	Record room capacity to manage number of delegates that can be booked onto courses
LOC03	Location Address	Record postal address for the location.
COU01	Course	Maintain a list of the training courses with detail information including ... - Course duration - Maximum places - Trainer, Assessor, IQA, Observer, Independent Assessor. - Sampling Methods
COU02	Modules	The units/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 or Optional.
COU04	Course Products	Assign Products to a Course, eg books etc
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 booking checks Define non course based prerequisites with booking checks Checks can be defined as errors or warnings (ie not proceed or proceed) and allowable exemptions.
COU07	Course Finance	Record price with date range validity for price. Price can be per delegate or for the course as a whole (block bookings) 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.

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COU09	Course emails	Send email with attached documents when significant events happen including Course booking.
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/View Product(s) for an Event, initially copied from Course
EVE03	Event Sessions	Sessions automatically created based on the Modules from the Course
EVE04	Event Location	Where the Event is being delivered
EVE05	Event Trainer	Assign a Trainer to an Event - including multiple trainers at Module level
ACT01	Activities	A generic way of recording things to be done, with or without associated dates.
	Enquiry	Activity of type Enquiry is used to record customer interest in Events. Use Activty date to follow up.
ACT02	Link Activity to Contact or Room	Use to record Contact non Event based activity; Contact Activity, for example holidays. Room Activity, when a room is in use for something other than a training session.
SCH01	Calendar View	Event Session Scheduling; Diary /Calendar View of Trainer and Room use. Enquiries; Diary/Calendar view of Activities with Type = Enquiry on given date. Use for Enquiry follow up.
SCH02	Trainer/Room availability checking	Check the Contact is free to train the session (and IQAs and other staff) as well as the room being free
BKG01	Event Bookings	Book delegates onto an Event, either via an Organisation or as an individual
BKG02	Event Booking Management	Via room capacity manage number of people allowed to be booked onto Event. Availability checks on rooms and trainers.
BKG03	Event Booking - Bulk Import	Import Delegate booking(s) from file; create new Contacts as needed, with duplicate check for existing Contact.
BKG04	Block Bookings & TBA Bookings	Allow multiple contacts to be booked onto an event where delegate names/details are To Be Advised later
BKG05	Mark Delegates as Attended / Passed	
BKG06	Generate Certificate(s)	Certificates of Attendance, Achievement, Transcript (Unit Listing)
BKG07	Event Booking Invoices	Raise invoice(s) for the Event booking
BKG08	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	Payments	Card payments, bank transfer etc
FIN06	Refunds	Manage refunds if required
FIN07	Substitutions	Assign a different student name to the booking
FIN08	Cancellations	Cancel a booking
FIN09	Transfers	Transfer to another course
REP01	Reports	Set of standard system reports including Trainer Utilisation Report.
INT01	Integration to Finance System	Export Account data, Invoices and Payment to Finance system.
INT02	Integration to Parnassus	Registrations, achievement upload to awarding organisations
INT03	Integration to Monarch	For Compliance, Risks, Workflows, Tasks, Reminders, eForms
DOC01	Documents	Set of standard documents, including; - Booking Confirmation - Feedback forms - Chase Payment Letter. These can be done via email templates too.
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 field is Mandatory, if field 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, eg group of courses sold at a discounted price.
ADM08	Setting	Set information for your business, 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.
ADM10	User Management	Multi-Factor Authentication