



## Update on NeatClubs.COM Features

July 15, 2009

Dear NeatClubs.COM customer,

It has been some time since we've offered a proper update on NeatClubs.COM enhancements, so we thought we'd take a minute and share some recent enhancements to the software with you.

If you are "deep" into managing registrations with NeatClubs.COM, or are considering doing so, this is likely worth a quick read with your morning coffee.

Our approach to adding new features is to make them "invisible" to existing customers. This way we minimize disruption to existing customer web-sites. As a result, many will be unaware of these new features that have crept in over the past several months as they must be explicitly "turned on" in the System Setup to take advantage of them.

What follows is a brief summary of these enhancements. If you are interested in making use of any new features, please let us know and we will be happy to help you get them enabled.

Thank you once again for your continued interest in NeatClubs.COM. If you have suggestions that would help us make NeatClubs.COM a more capable web-site, registration and club management tool, we would be grateful for your feedback.

- 1. Camp Registrations:** Thanks to some early adopters this summer, we've made rapid progress on Summer Camp registrations. Half a dozen clubs have been using our camp registration facility and accepting reasonably high volumes of registration and payment transactions.

Features we have enabled in our new "camp" event type include:

- Support for multiple concurrent camps with different dates, fee structures and options
- Selectable registration "granularity" for clubs that allow half-day or full-day selections with the ability to optionally require that registrations be made for a full-week
- Daily camp attendee lists and theme day support
- The ability to modify camp attendance dates and options after a registration
- Registrations work according to a "rolling window" so that parents can only register their children for future camp dates only

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- Selectable options for camps with option price impacts are available for early drop-off, late pick-up and other extra cost program options.
- Support for weekly rates vs. daily rates as well as additional discounts for attendees that register for multiple weeks at a time
- Configurable pro-rate policies
- “By day” and “by stream” capacity management, to prevent camps from being over-subscribed
- The ability to accept multiple camp registration transactions per child in the same session

Our camp registration module also applies to March Break programs, or programs offered over Christmas break where flexible daily registration is often required.

**2. Registration Grace Periods:** Frequently a parent will register for a program and abandon the registration when they get to the stage of on-line payment. This can happen for a variety of reasons. Club owners generally want to be aware of these partial or incomplete registrations since these are prospective customers that should be followed-up with. By default, NeatClubs.COM retains these partial registrations so that a club administrator can follow-up or delete as they see fit. As long as the partial registration remains on the incoming registration list, it is holding a space in the class or program.

New configuration options allow policies to be applied around the automated removal of these incomplete registrations. Configurable “grace periods” can be implemented giving registrants a finite period to provide payment. For example, a club might institute a 24 hour grace period policy so that a registration slot will be tentatively held, but automatically removed if payment is not applied within that period. This ensures that slots are occupied only by paying customers, and saves administrators the trouble of removing the incomplete registrations manually.

**3. Customers can now “resume” incomplete registrations:** A new setup option detects repeat visits from the same computer, and informs a prospective customer if there are incomplete registrations made from their computer that require payment even before they log in. Customers can then follow instructions to login and pay without needing to re-enter registration form information. They might also elect to delete their registration subject to the policies of the grace period settings described above. Customers can see their completed registrations, but of course they cannot delete or modify them. This is left to the club administrator.

**4. Improvements in “Export to CSV Functionality”:** Some clubs wish to load received registration data into their own internal systems for tracking registrations and managing membership. The “Export to CSV” functionality is now more flexible, allowing registrations to be exported based on registration type or on the date

ranges received. For G.O. member clubs, ITSportsNet has graciously provided us with the CSV format they require for import so that we can export data directly from NeatClubs.COM and import it into ITSportsNet with no need to re-enter registrations into the ITSportsNet. We are piloting this functionality in the coming month.

- 5. Administrator can register on behalf of a parent:** NeatClubs.COM was originally conceived as a web-management, on-line registration system. We've been evolving to introduce more club management capabilities, as time goes on. To accommodate "walk-in" registrations and registrations by phone, a logged-in administrator can now register directly on behalf of a parent without needing to log out of the system.
- 6. Self-serve receipts and confirmation e-mails:** Customers with login accounts on the web-site (generally anyone who has registered for a class) can login at any time and re-generate their confirmation e-mails. The text in these confirmation e-mails is configurable so that these generated e-mail receipts meet the criteria required for the Canadian Children's Fitness Tax Credit. Even if the administrator has registered on behalf of the parent, the receipt e-mail can be sent automatically to the parent as long as the parent has an e-mail address in their member profile. This reduces or, in some cases, avoids the need to produce manual tax receipts.
- 7. Class Lists / Attendance Lists:** For class registrations, NeatClubs.COM can now generate print-ready class lists or attendance lists for each individual class. The fields to be included in these lists are selectable at the time they are generated.
- 8. Customizable registration forms based on Microsoft Word templates:** For clubs that have developed their own printable registration forms in Microsoft Word, NeatClubs.COM can now employ a "mail-merge" like functionality to allow incoming registrations to be directly printed on your own template from the web-site.
- 9. Class and event archival:** Through the "List Events and Classes" option, the list of events can become quite long for customers who have been using NeatClubs.COM for multiple years. Through this interface, it is now possible to "archive" events so that they still remain in the system but are "invisible" most of the time. This means that the screens listing events, will not be cluttered with old programs. Classes can be "unarchived" at any time, and the system will still remember prior registrants even though the registration events themselves have been archived.

**10. Improved ability to edit multiple event definitions at once:** The events in NeatClubs.COM have many configurable options. The “Edit Multiple Events at Once” functionality saves time because it allows all classes for a session to be reviewed for errors on a single screen. This function has now been enhanced in several ways including the ability to review multiple events of different types “side by side”. (use for setting up Camps, Birthday Bookings or Camp Registration events that use a different underlying event type)

**11. Enhancements to “Copy to New Session” functionality:** We’ve enhanced our “Copy to New Session” functionality under the “Class & Session Administration” option. For clubs that run largely the same programs from session to session, it is now faster to clone class structures between sessions with support for exclude dates and different class durations.

**12. Accept registrations for multiple sessions concurrently:** While NeatClubs.COM has had this capability for some time, we’ve proven this in practise recently with multiple clubs now accepting various Summer, Fall and even Winter programs registrations concurrently.

**13. Support for subscription style / competitive registrations:** For clubs accepting “pay by the month” competitive registrations, we can now accept registrations that will automatically deduct a configurable, up-front amount, plus a fixed amount from a credit card month after month without any activity required on the part of the parent or club administrator.

**14. Improvements to “auto-open” functionality for class registration:** We’ve improved the “auto-open” function that existed previously to make it easier to use. Threshold dates can now be configured independently for both the public and web-site account holders. In addition to the start date, a specific time of day to automatically open registrations can now be configured.

**15. Improvements to “early-bird discount” functionality:** For those clubs wanting to provide an economic incentive to get customers to register and pay early, the early-bird discount option has been enhanced to make the messages shown to the users more intuitive.

**16. Improvements for advanced requirement more control over the web-site:** For customers who are knowledgeable in web-design, there is an improved ability to inject your own stylesheets or design elements into portions of the NeatClubs.COM web-site framework that were previously not configurable.

**17. Improved SPAM filter:** For customers using NeatWorx to host their mail accounts, we now offer an improved SPAM filter. Through the PLESK interface, customers can login, configure the sensitivity of the SPAM filter, and “train” it to understand what e-mail you consider to be SPAM. Unfortunately, we can only filter SPAM on the mailboxes that we host ourselves at NeatWorx. We cannot filter SPAM in scenarios where we forward e-mail to another internet provider.

**18. Enhanced system logging:** For club owners or administrators who would like to have more visibility or control over who is logging into their web-site, the System Log under “Traffic, Metrics and Logs” has been enhanced to provide much more detail about “who did what when”.

**19. Direct Google Analytics integration:** For organizations wanting to use the free Google Analytics tools to measure and analyze traffic to their web-site, NeatClubs.COM has built in support for Analytics. This means all you need to do is obtain your Analytics account from Google, and enter the account number into the NeatClubs.COM System Setup. Everything else is automatic.

**20. Formalized service offerings and modification of terms:** While we will obviously honour all existing customer agreements, we have revised our pricing schedule and terms. Our new pricing schedule and services descriptions can be found on NeatWorx.COM under “About NeatWorx” / “NeatWorx Pricing”. We have also instituted a new “support request” form on our web-site to help us avoid losing track of incoming support requests.

### **Other planned, near-term enhancements**

One of the major plans we have for NeatClubs.COM in the coming months is to enable a shift to a “participant or athlete centric” membership management model. This is a part of our journey to build more club management capability directly into our web-based offering.

The current definition of a “member” in NeatClubs.COM is actually geared more toward a professional association than it is for a Children’s Recreation Center. This is because, in a recreational programs context, the registrant is normally the parent, and the participant is normally the child. Our definition of member would currently refer to the parent.

## NeatClubs.COM – New Features Update

Using the “Enable Club Management Features” option already present in our System Setup, in the next few weeks we will be introducing a new “Manage Participants” option on the left hand menu visible only to the web-site administrator.

For clubs with the club management features enabled, the “Manage Members” option will change to “Manage Account Holders”. We feel this will better describe how clubs are using our software. For associations and other organizations where the account holder and member are one and the same, the functionality will remain unchanged.

Once this change is fully in place, NeatClubs.COM will shift to being more “participant centric” or “athlete” centric, as opposed to, web-site account holder and registration transaction centric.

This new participant data structure is already present in NeatClubs.COM in anticipation of this change. Under “System Setup” / “Utility Functions”, the “Populate Participant Table” will generally be run once (by us) to populate all prior registrations, including those from prior years, into the new participant database. (This utility can be run multiple times without harm). From then on, new registrants will automatically appear in the participant database.

New features that this transition will enable will include:

- Managing Athlete Roles and Disciplines from within NeatClubs.COM (since these roles follow the participant record rather than the account holder record)
- Governing body membership numbers can be maintained on-line
- Participant achievement history and summaries of prior classes completed
- The ability to dump a complete CSV record in the format required by ITSportsNet for those clubs who are Gymnastics Ontario members
- A faster more convenient way to look up athlete information

In advance, we thank you for your time in reviewing these exciting changes. If you have any questions, about these, or any of our advanced features , please don't hesitate to ask.

Sincerely,

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