



**NATIONAL MUSEUMS LIVERPOOL**

Ticketing Solution

**Author:** Ian Lindsay

**Date:** 29/03/2017

Appendix B – Requirements Detail

The following sections describe the required functionality for the Core Accounting System. Each requirement has been assigned a category using the following terminology:

**M** – Mandatory; this requirement is fundamental to the operational requirements

**HD** – Highly desirable; this requirement though not mandatory will greatly assist the operational requirements

**D** – Desirable – this requirement is deemed a “nice to have”

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Ref | Description of Requirement | Pty | Indicate Compliance | Notes |
| * + - 1. Core Functional Requirements | | |  |  |
| 1.1 Overview  Overview | | |  |  |
| 1.1.1 | The system must be fully integrated or fully interfaced; i.e. ticket selection, payment, etc. | M | YES / NO |  |
| 1.1.2 | The system must provide all screens, documentation and help (on screen and electronic/printed manuals) in UK English. | M | YES / NO |  |
| 1.2 User Security | | |  |  |
| 1.2.1 | User Accounts |  |  |  |
| 1.2.1.1 | The system must allow an unlimited number of “potential” users subject to licensing requirements; for example named users or concurrency. | M | YES / NO |  |
| 1.2.1.2 | The system must control user access via an authentication mechanism based on a unique username and password login for each user. | M | YES / NO |  |
| 1.2.1.3 | The system must ensure that all authentication data and the mechanism itself are protected against unauthorised access. | M | YES / NO |  |
| 1.2.1.4 | The system must not echo the password on screen, instead the system must display an asterisk (\*) or similar character. | M | YES / NO |  |
| 1.2.1.5 | The system must allow the System Administrator to specify who can amend user passwords:   * System Admin and/or user | M | YES / NO |  |
| 1.2.1.6 | The system must log user access (including reporting):   * date last used * unsuccessful log-in attempts (username, password and workstation) | M | YES / NO |  |
| 1.2.1.7 | The system must log user activity; for example, by function. | M | YES / NO |  |
| 1.2.2 | Access Control | |  |  |
| 1.2.2.1 | The system should allow for each user to be assigned to a user group; for example by job function or departmental structure/hierarchy. | M | YES / NO |  |
| 1.2.2.2 | The system should allow the definition of different levels of access control for each user group | M | YES / NO |  |
| 1.2.2.3 | The system should provide full access control at both a functional level and a data level. | HD | YES / NO |  |
| 1.2.2.4 | The system must not display any function or information to which the user has not been granted access:   * Menus/screens * Transaction types i.e. documents * Transaction data i.e. single accounts or groups of accounts * Standing data | HD | YES / NO |  |
| 1.2.2.5 | The system must split access control by activity:   * Add * Modify/change * Delete * Enquire * Report | M | YES / NO |  |
| 1.2.2.6 | The system must apply the access controls to the running of standard and ad-hoc reports / enquiries as well as the core functionality. | M | YES / NO |  |
| 1.2.2.7 | The system should provide a configurable default user access control; for example, grant “enquire-all”, “change-none” type permissions. | HD | YES / NO |  |
| 1.3 Transaction Processing | | |  |  |
| 1.3.1 | The system must permit users to amend or cancel (delete or void) any transaction at any time prior to authorisation or the commitment of data to the database, subject to process and user access controls. | M | YES / NO |  |
| 1.3.2 | The system should provide mail-merge facilities. | M | YES / NO |  |
| 1.4 Data Entry, Validation and Lookup | | |  |  |
| 1.4.1 | Data entry should be kept to a minimum with automation being used wherever possible to reduce the number of keystrokes. | HD | YES / NO |  |
| 1.4.2 | The system must provide automatic validation during data entry (with ability to make corrections) | M | YES / NO |  |
| 1.4.3 | The system should support wildcard lookups | M | YES / NO |  |
| 1.4.4 | The system must allow certain user-defined fields to be made mandatory for data input. | M | YES / NO |  |
| 1.4.5 | The system must provide the following input controls:   * data type; for example, alpha, numeric or alphanumeric * minimum field size; for example, at least two characters * within range/outside limits; for example valid day within month | M | YES / NO |  |
| 1.4.6 | The system should provide the following input controls:   * inappropriate punctuation; for example, inappropriate characters in monetary values * relationship with other fields; for example, start/end dates * relationship with other data already in the system; for example, transaction reference | M | YES / NO |  |
| 1.4.7 | The system must provide additional integrity controls when inputting transactions:   * consistent transaction details (for example, line items adding up to the transaction total) | M | YES / NO |  |
| 1.4.8 | The system should provide consistent date handling and support the flexible input of dates; for example, 01/04/03, 01-Apr-2003, 010403, 01042003 etc. | **HD** | YES / NO |  |
| 1.4.9 | The system should provide consistent currency handling and support the flexible input of monetary amounts; for example,1000, 1000.00, 1,000 etc. | **HD** | YES / NO |  |
| 1.4.10 | The system should allow the definition of output formats for monetary values, e.g. using commas to separate £000s and putting negative numbers in brackets | **HD** | YES / NO |  |
| 1.4.11 | The system must always display easily understood error messages whenever an input error (for example data validation) is made. | M | YES / NO |  |
| 1.5 Auditing and System Integrity | | |  |  |
| 1.5.1 | Audit Log | |  |  |
| 1.5.1.1 | The system must provide comprehensive auditing facilities covering all data entry and user activity. | M | YES / NO |  |
| 1.5.1.2 | The system must record sufficient information to permit users and external auditors to check easily the completeness of the audit trail. | M | YES / NO |  |
| 1.5.1.3 | The audit trail/log must record as a minimum:   * username/password * date/time stamp * all relevant transaction data * all relevant standing data | M | YES / NO |  |
| 1.5.1.4 | In particular, audit trails relating to the transfer of information between applications must exist in a form to assist manual troubleshooting should discrepancies occur. | M | YES / NO |  |
| 1.5.1.5 | The system must record all attempted security violations. | M | YES / NO |  |
| **1.5.2** | **System Security** | |  |  |
| 1.5.2.1 | The system must prevent users from amending the audit trail data. | M | YES / NO |  |
| **1.6 Archiving** | | |  |  |
| 1.6.1 | The system must provide the System Administrator comprehensive archiving facilities to allow data which is no longer required on a day-to-day basis to be summarised and removed from the main application database. | HD | YES / NO |  |
| 1.6.2 | The system must allow all data to be archived:   * Transaction data * Standing data | **HD** | YES / NO |  |
| 1.6.3 | The system should allow archived data to be viewed and reported on. | **HD** | YES / NO |  |
| 1.6.4 | The system must provide facilities to allow archived data to be restored. | **HD** | YES / NO |  |
| 1.6.5 | The system must ensure that the integrity of the system is not compromised after archive (for example, orphaned records, transactions out of step with balances). | M | YES / NO |  |
| 1.7 Enquiries | | |  |  |
| 1.7.1 | The system must provide ad-hoc enquiry facilities across all data, subject to user access control. | M | YES / NO |  |
| 1.7.2 | The system should allow the user to define search/filtering criteria; for example:   * name * first line of address or post-code * description * date range; for example, input date, due date, payment date | M | YES / NO |  |
| 1.7.3 | The system should allow searches based on partial codes. Note that it should be possible to use ‘wildcards’ in searches in any position of the code, replacing leading as well as trailing characters if required. | HD | YES / NO |  |
| 1.7.4 | All enquiry screens should have the ability to scroll forwards and backwards when looking at more information than will fit in a single window. | HD | YES / NO |  |
| 1.8. Reporting | | |  |  |
| 1.8.1 | Report Writer | |  |  |
| 1.8.1.1 | The system must provide either a built- in report writer or integrate with an industry standard stand-alone reporting application capable of reporting across all data, subject to user access control | M | YES / NO |  |
| 1.8.1.2 | The report writer should be intuitive, user-friendly and functionally rich and allow relative novices to construct useful reports. It is essential that these data processing/reporting routines may be defined without specialist programming knowledge. In other words, the skills to define these processes may be acquired by any PC literate user with appropriate training; for example, the use of drag and drop layout tools, dropdown lists of valid fields and formula wizards etc. | M | YES / NO |  |
| 1.8.1.3 | The system must not permit the report writer to update the database. | M | YES / NO |  |
| 1.8.1.4 | The system should provide a web browser based version of the report writer- with restricted access and drill down | M | YES / NO |  |
| 1.8.1.5 | The system must be delivered with a suite of reports. | M | YES / NO |  |
| 1.8.1.6 | The report writer should be capable of reporting on:   * transaction data * standing data * current year and periods | M | YES / NO |  |
| 1.8.2 | Building Reports | |  |  |
| 1.8.2.1 | The report writer must be provided with a graphical interface to allow drag/drop and WYSIWYG editing/page layout. | M | YES / NO |  |
| 1.8.2.2 | The report writer should allow a report to be fitted to a page; i.e. a single page or to page width. | M | YES / NO |  |
| 1.8.2.3 | The report writer should allow the merging of data and/or calculating results from different fields or dimensions. | HD | YES / NO |  |
| 1.8.2.4 | The report writer should allow data to be grouped and/or sorted. | **HD** | YES / NO |  |
| 1.8.2.5 | The report writer should allow details to be suppressed and support the printing of summary information such as:   * sub-totals and totals * item/line counts | **HD** | YES / NO |  |
| 1.8.2.6 | The report writer should support the definition of conditional logic; for example, display all negative numbers in brackets, italics or coloured red. | **HD** | YES / NO |  |
| 1.8.2.7 | The report writer should support headers and footers | **HD** | YES / NO |  |
| 1.8.2.8 | The report writer should be able to create bar charts and graphs. | **HD** | YES / NO |  |
| 1.8.2.9 | The report writer should be able to format reports as:   * Columnar * tabular or * switch format within a page | **HD** | YES / NO |  |
| 1.8.3 | Running Reports | |  |  |
| 1.8.3.1 | The system should allow reports to be run on demand or scheduled (individual and suites of reports) to run at specified times/days | HD | YES / NO |  |
| 1.8.3.2 | The report writer should allow reports to be directed to:   * A screen * A printer * A network drive * directly into Microsoft Excel in a format which allows further interrogation * an email address; either manually or automatically | M | YES / NO |  |
| 1.8.3.3 | The report writer should allow a report to be previewed on screen before onward distribution. | **HD** | YES / NO |  |
| 1.8.3.4 | The report writer should allow the full width of the report to be displayed on screen when previewing. | **HD** | YES / NO |  |
| 2 Technical Requirements | | |  |  |
| 2.1 General Design/ Architecture | | |  |  |
| 2.1.1 | The system must stamp all transactions with the user name and a date/ time stamp. | M | YES / NO |  |
| 2.2 Help and Documentation | | |  |  |
| 2.2.1 | The system should provide online context sensitive help at the following levels:   * whole screen level * individual field level | **HD** | YES / NO |  |
| 2.2.2 | The system should allow any help screen to be printed in a convenient format. | **HD** | YES / NO |  |
| 2.2.3 | The online help should include a step-by-step training guide. | **HD** | YES / NO |  |
| 2.2.4 | All user documentation should be provided in both hard-copy format and electronic (PDF/word) format | **HD** | YES / NO |  |
| 2.2.5 | The documentation should include worked examples. | **HD** | YES / NO |  |
| 2.3 User Interface | | |  |  |
| 2.3.1 | The system must offer the ability to navigate seamlessly between different functional areas with a consistent look and feel and without the need to logout and log back in. | M | YES / NO |  |
| 2.3.2 | The system should provide fast navigation of menu paths. | **HD** | YES / NO |  |
| 2.3.3 | As far as possible the interface should be consistent with Microsoft Office suite applications in terms of toolbars etc. | **HD** | YES / NO |  |
| 2.3.4 | The system must be compatible with applications to assist the visually impaired. | M | YES / NO |  |
| 2.3.5 | The system must be compatible with applications to assist users who are unable to use a keyboard | M | YES / NO |  |
| 2.3.6 | The system should provide access to certain functions via a web browser interface | HD | YES / NO |  |
| 2.4 Interoperability | | |  |  |
| **2.4.1** | Exporting Data | |  |  |
| 2.4.1.1 | The system must be capable of exporting data to other systems from any module; for example address mail merge and sales downloads. | M | YES / NO |  |
| 2.4.1.2 | The system must support the following export file formats:   * CSV text file * ASCII text file * XML message * Microsoft Excel * Microsoft Word * Microsoft Outlook/Exchange | M | YES / NO |  |
| **2.4.2** | Importing Data | |  |  |
| 2.4.2.1 | The system must be capable of importing data from other systems. | M | YES / NO |  |
| 2.4.2.2 | The system must support the following import file formats:   * CSV text file * ASCII text file * XML message * Microsoft Excel | M | YES / NO |  |
| 2.4.2.3 | When importing data, the system should provide the same validation as if the data had been keyed directly into the system by a user via a standard transaction screen. | HD | YES / NO |  |
| **2.4.3** | Interfacing | |  |  |
| 2.4.3.1 | The system must support an application program interface (API) to allow the system to both receive transactions from other systems and to post transactions to other systems. | M | YES / NO |  |
| 2.4.3.2 | The system must be capable of generating return messages to provide two-way interface support. | M | YES / NO |  |
| 2.4.3.3 | The system should allow automatic real time interfaces as well as batch interfaces. | HD | YES / NO |  |
| 2.4.3.4 | The system should provide a facility to allow the amendment (view and update) of rejected interface files before re-submission, subject to access controls. | HD | YES / NO |  |
| 2.4.3.5 | The system must be configurable to prevent the same transactions being posted more than once but also allow resubmission. | M | YES / NO |  |
| 2.4.3.6 | The system should allow sequence controls on all interface files | HD | YES / NO |  |
| 2.4.3.7 | The system must provide a full audit trail of all interface records (including amendments to files) both on-line and to file output. | M | YES / NO |  |
| 2.5 Data Retention | | |  |  |
| 2.5.1 | The system should be able to hold at least 10 prior years of transaction data online. | HD | YES / NO |  |
| 2.6 Data Integrity and Recovery | | |  |  |
| 2.6.1 | For hosted solutions - The system must have a fully documented IT disaster recovery plan. This must include details for rebuilding all components of the service; for example, Operating System installation and configuration, Back-Office installation and tuning etc. | M | YES / NO |  |
| 2.6.2 | The system must provide facilities to enable recovery and rollback in the event of a database corruption and to notify the System Administrator of results. The maximum rollback must be no more than one working day but, the ability to rollback several days to the point of corruption is required. | M | YES / NO |  |
| 2.6.3 | The system must provide a facility to restore the system to a known state in the event of any software or hardware failure. This must be no older than the previous day’s backup, and must be completed within no more than 24 hours of the failure of normal operation. | M | YES / NO |  |
| 2.6.4 | The system must provide automated backup and recovery procedures that allow for regular backup of all or selected records in its data repository. | M | YES / NO |  |
| 2.6.5 | The system must only allow users with administrative privileges to restore from backup. Full integrity of the data must be maintained after the restore. | M | YES / NO |  |
| 2.6.6 | The system must allow users with administrative privileges to roll-forward the system from a backup to a more recent state, maintaining full integrity of the data. | M | YES / NO |  |
| 2.6.7 | The system must maintain data integrity. | M | YES / NO |  |
| 2.6.8 | The system should offer built-in error recovery procedures. | D | YES / NO |  |
| 2.6.9 | The system should offer end-to-end tracking of faults. | D | YES / NO |  |
| 2.7 Performance Requirements | | |  |  |
| 2.7.1 | The system should be scalable such that it can offer a target response time for all online processing excl of one second. The proposed standard is:   * 90% of all response times to be one second or less * 98% of all response times to be three seconds or less * 100% of all response times to be five seconds or less | HD | YES / NO |  |
| 2.7.2 | The system should allow printing of all reports to be in background mode and should not affect the performance of the system or access to it. | M | YES / NO |  |
| 2.8 Implementation Procedures | | |  |  |
| 2.8.1 | The system must be delivered with comprehensive technical and user documentation in both printed and electronic form. | M | YES / NO |  |
| 2.8.2 | The system must be delivered with a formal training programme. | M | YES / NO |  |
| 2.8.3 | The system must be implemented using a formal implementation methodology. | M | YES / NO |  |
| 2.8.4 | The system must be delivered with configuration management tools. | M | YES / NO |  |
| 2.8.5 | The system must be capable of integrating with other complementary systems; for example by means of an integration framework. | M | YES / NO |  |
|  | | | |  |
| Ticketing | | | |  |
| **3.1 Overview** | | |  |  |
| 3.1.1 | Simple and intuitive to use | M | YES / NO |  |
| 3.1.2 | Able to categorise ticketed events as exhibition, educational, groups, corporate, etc. and report by event type | M | YES / NO |  |
| 3.1.3 | Able to allocate venue, space and resource to the ticketed event | HD | YES / NO |  |
| 3.1.4 | Can set ticket capacities on each event by ticket type | HD | YES / NO |  |
| 3.1.5 | Unique references automatically applied to each booking/purchase | M | YES / NO |  |
| 3.1.6 | *Gift Aid* – can allow an added donation and collect the necessary information for NML to claim Gift Aid. | M | YES / NO |  |
| 3.1.7 | API with membership database (raisers edge) and corporate database (Priava) | HD | YES / NO |  |
| 3.1.8 | Can automatically apply membership discount to tickets via membership code input | M | YES / NO |  |
| 3.1.9 | Can specify and apply discount to groups, e.g. corporate members | M | YES / NO |  |
| 3.1.10 | Can apply other discount codes/promotional offers | M | YES / NO |  |
| 3.1.11 | Can sell online and in venue (via EPOS solution), in venue pop-up shop (via EPOS/tablet solution) and box office (via till point and via PC). Please provide details of hardware requirements and costs (inc ticket printing hardware) | M | YES / NO |  |
| 3.1.12 | When creating an event can select dates/times for a run of the same ticketed offer to copy and paste information across multiple bookings for ease | M | YES / NO |  |
| 3.1.13 | Comprehensive CRM with fields that can be reported on | M | YES / NO |  |
| 3.1.14 | Able to mail merge from CRM to e-shot via Mail Chimp ideally and/or similar mass mail out solution. Please specify which solutions you currently integrate with. | M | YES / NO |  |
| 3.1.15 | Can store information about a booking - e.g. emails, pdfs, notes | HD | YES / NO |  |
| 3.1.16 | Can set up timed admissions and with restricted capacity ticketing per timeslot/event. With ticket capacity left available to sell being highly visible to sales team in venue and box office and to the customer via online. | M | YES / NO |  |
| 3.1.17 | Can set capacities for online sales separate to venue sales to allow for walk up sales. With the ability to release unsold online sales to general admissions easily to maximise sales | M | YES / NO |  |
| 3.1.18 | Able to set timed offers to automatically apply as required. | HD | YES / NO |  |
| 3.1.19 | Able to interface with Verteda Epos solution to enable ticket and merchandise sales from single till point. Please detail how this can be achieved/what needs to be considered | HD | YES / NO |  |
| 3.1.20 | Online and in venue payment via World Pay merchant services. If World pay is not supported please specify merchant services supported. | HD | YES / NO |  |
| 3.1.21 | Integrated PDQ/PED for credit/debit card sales | M | YES / NO |  |
| 3.1.22 | A range of templates to enable easy design of branded tickets including images if required and additional text/information. | M | YES / NO |  |
| 3.1.23 | Can create seating layouts to ticket allocation, e.g. theatre style | M | YES / NO |  |
| 3.1.24 | Diary view of ticketed events - including by venue or by date range | M | YES / NO |  |
| 3.1.25 | Diary view can be filtered to view every ‘Sat’ for example in a month period | HD | YES / NO |  |
| 3.1.26 | Comprehensive suite of reports including all financial and sales information, capacities, sales splits, sales by event type, ticket type, merchandise sales, gift aid, VAT, post code analysis. | M | YES / NO |  |
| 3.1.27 | Barcode scanning option from e-ticket on mobile phone. Hardware requirements and costs to be detailed for scanning in tickets at point of entry | M | YES / NO |  |
| 3.1.28 | Barcode not Jpeg or gif and does not infringe current patent by ‘ticket to go’. | HD | YES / NO |  |
| 3.1.29 | Reports can be exported into multiple formats including Excel and pdf | M | YES / NO |  |
| 3.1.30 | Branded NML web front end for seamless customer online ticket purchase. Able to set up branded online site for each NML venue. Details on how this is achieved required | M | YES / NO |  |
| 3.1.31 | Detail if kiosk options are available for ticket sales and/or ticket collection | HD | YES / NO |  |
| 3.1.32 | Payment options - to include cash, card, contactless pay, pay pal, invoice | M | YES / NO |  |
| 3.1.33 | Able to identify fields as essential to ensure full data capture | M | YES / NO |  |
| 3.1.34 | Able to use for free ticketed events as well as paid for events | M | YES / NO |  |
| 3.1.35 | Robust solution that will withstand large customer sales processing demand both online and in venue without reducing speed or failing. | M | YES / NO |  |
| 3.1.36 | *Clear and intuitive customer journey* – minimal clicks to order tickets, and an intuitive layout. | M | YES / NO |  |
| 3.1.37 | *Can sell multiple ticket options* – can offer tickets for tours and other events as part of bundles or upsell in a way that retains a smooth and intuitive customer journey. | M | YES / NO |  |
| 3.1.38 | *Dynamic pricing* – able to differentiate several different tiers prices according to demand, in a transparent and understandable way for customers. | HD | YES / NO |  |
| 3.1.39 | *Capacity limiting* – able to set limits on the number of tickets any one customer can buy. | M | YES / NO |  |
| 3.1.40 | *Pre-sale capability* – able to offer pre-sales to designated groups of people. | M | YES / NO |  |
| 3.1.41 | *Defence against secondary selling* – must have a way of minimising secondary selling. | HD | YES / NO |  |
| 3.1.42 | *International sales* – must allow international customers to purchase tickets easily (both individuals and groups). | HD | YES / NO |  |
| 3.1.43 | *Limited capacity signalling* – able to show on website when tickets for a certain time or day are limited or sold out. | M | YES / NO |  |
| 3.1.44 | *Real-time ticket and capacity monitoring* – teams in the museum able to see how many people have booked tickets for which slot in real time (for both exhibition entry and tours). | M | YES / NO |  |
| 3.1.45 | *In-venue ticket sales* – allowing teams across all NML venues to sell tickets using the same solution, or something directly integrated with that solution, to allow for effective real-time capacity monitoring. | M | YES / NO |  |
| 3.1.46 | *Group bookings facility* – bookings system for schools, groups and travel trade. | M | YES / NO |  |
| 3.1.47 | *Group bookings information capture* – able to store information such as access requirements, notes etc. | M | YES / NO |  |
| 3.1.48 | *Statistical reporting* – able to easily produce comprehensive statistical reports, including dashboards, and visitor profile information, that can be exported into multiple formats. | M | YES / NO |  |
| 3.1.49 | *Multi-venue* – able to rollout ticketing solution across six venues. | M | YES / NO |  |
| 3.1.50 | *Ticket website* – either a white label site, or ticketing software that will easily integrate with a ticket page on our website. White label site must be mobile responsive | M | YES / NO |  |
| 3.1.51 | *Access control* – scanners for checking tickets, and the tickets themselves (either e-tickets or physical tickets). | M | YES / NO |  |
| 3.1.52 | *Mobile compatible tickets* – paperless tickets accessible by smartphone. | M | YES / NO |  |
| 3.1.53 | *Postcode look up* – for ease of data collection. | HD | YES / NO |  |
| 3.1.54 | *PCI compliance* – solution meets PCI compliance requirements for all online, in venue and box office sales. | M | YES / NO |  |
| 3.1.55 | *Third party ticket sales allocation*. Able to allocate tickets to third party agents to sell using system generated barcodes to ensure robust access controls | HD | YES / NO |  |
| 3.1.56 | *Membership sales*. Able to sell membership directly and feed data back to current Risers Edge membership database. | HD | YES / NO |  |
| 3.1.57 | Able to issue individual barcodes for each person in a group booking to ensure robust access controls | M | YES / NO |  |
| 3.1.58 | Able to produce online analytics, e.g. drop off rate, basket abandonment | HD | YES / NO |  |
| 3.1.59 | Offer donation or round up option when purchasing a ticket | HD | YES / NO |  |
| 3.1.60 | Able to effectively manage customers wishing to change tickets/dates/times/lost tickets to minimise fraud and maximise customer service | M | YES / NO |  |
| 3.1.61 | Able to add customers to a waiting list if required. | HD | YES / NO |  |
| 3.1.62 | Able to flexibly add and remove a booking fee based on where the ticket is purchase. For example online fee, in venue no fee. Fee to be clearly display for online transactions. | M | YES / NO |  |
| 3.1.63 | Set times tickets go off sale for a time slot or ticket type. | M | YES / NO |  |
| 3.1.64 | Ability to add marketing questions to online sales i.e. How did they find us | HD | YES / NO |  |
| 3.1.65 | *Easy to configure in venue ticket sales screens* | M | YES / NO |  |
| 3.1.66 | Offline functionality – able to set parameters to continue to sell tickets in the event the solution goes offline. When solution goes back online the background upload doesn’t slow the solution down. | M | YES / NO |  |
|  |  |  |  |  |
| Event Booking Management | | | | |
| **4.1 Overview** | | |  |  |
| 4.1.1 | Simple and intuitive to use | HD | YES / NO |  |
| 4.1.2 | Categorise bookings as educational, groups, corporate, public programme etc. and be able to report on these. | HD | YES / NO |  |
| 4.1.3 | Able to allocate venue, space and resource to the booking | HD | YES / NO |  |
| 4.1.4 | Can set capacities on resources to avoid double booking | HD | YES / NO |  |
| 4.1.5 | Unique references applied to each booking/purchase | HD | YES / NO |  |
| 4.1.6 | API with membership database (Raisers edge) | HD | YES / NO |  |
| 4.1.7 | Can specify discount to groups, e.g. corporate members, schools member, standard members | HD | YES / NO |  |
| 4.1.8 | Can select dates/times for a run of the same event to copy and paste information across multiple bookings for ease | HD | YES / NO |  |
| 4.1.9 | Able to mail merge from CRM to e-shot | HD | YES / NO |  |
| 4.1.10 | Can store information about a booking - e.g. emails, pdfs, notes | HD | YES / NO |  |
| 4.1.11 | Can set up general admissions, timed admissions and restricted capacity ticketing and a combination of all of these | HD | YES / NO |  |
| 4.1.12 | Can set different capacities based on dates/times of the same event | HD | YES / NO |  |
| 4.1.13 | Letter templates for group bookings | HD | YES / NO |  |
| 4.1.14 | Diary view - including by venue, by date range, by day, week, month, and able to filter | HD | YES / NO |  |
| 4.1.15 | Diary view can be filtered to view every ‘Sat’ for example in a month period | HD | YES / NO |  |
| 4.1.16 | At a glance diary view to enable you to hover over an event and view the details including capacities | HD | YES / NO |  |
| 4.1.17 | Able to update status of the event with multiple unlimited options e.g. provisional, enquiry, confirmed, contract send etc. | HD | YES / NO |  |
| 4.1.18 | Able to run different types of bookings/events sheets. E.g. showing financials and without financials so these can be tailored for end user | HD | YES / NO |  |
| 4.1.19 | Can allocate 'set up' times to a booking to reserve space, not included in ticket booking time | HD | YES / NO |  |
| 4.1.20 | Can show which user has booked the space to allow for internal follow up | HD | YES / NO |  |
| 4.1.21 | Able to operate across multi-sited operation | HD | YES / NO |  |
| 4.1.22 | Able to identify fields as essential to ensure full data capture | HD | YES / NO |  |
| 4.1.23 | Able to produce events sheet to detail all ticketing for an event, any spaces booked and resources required | HD | YES / NO |  |
| 4.1.24 | Bookings can be made in real time | HD | YES / NO |  |
| 4.1.25 | Able to make a booking across more than one venue | HD | YES / NO |  |
| 4.1.26 | Can split big group down into smaller groups which are numbered e.g. group 1, 2 etc. | HD | YES / NO |  |
| 4.1.27 | Clear itinerary produced for large group that makes it clear which group is doing what event, where and when. | HD | YES / NO |  |
| 4.1.28 | Alerts when due to be a double booking in one particular room or for one particular session | HD | YES / NO |  |
| 4.1.29 | Can send confirmation letters to contact that has booked - automatically generates an email. | HD | YES / NO |  |
| 4.1.30 | Differentiates between numbers of children and numbers of adults in any one group and report on these per event/activity | HD | YES / NO |  |
| 4.1.31 | Allows for NML to carry out ongoing configuration i.e. sessions, add rooms etc. | HD | YES / NO |  |
| 4.1.32 | Has a notes field | HD | YES / NO |  |
| 4.1.33 | Within corporate/educational categories able to further categorise - multiple bespoke categories | HD | YES / NO |  |
| 4.1.34 | Able to allocate ticket sales for multiple client bookings to individual party bookings - to meet Christmas booking requirements | HD | YES / NO |  |
| 4.1.35 | Allows for front of house staff to easily enter unbooked groups and individuals into the system as they arrive | HD | YES / NO |  |
| 4.1.36 | Staff should be able to set parameters for the event e.g. number of places, alerts when is nearly full etc. | HD | YES / NO |  |
| 4.1.37 | Waiting list for places should be able to be added | HD | YES / NO |  |
| 4.1.38 | Can the room diaries by synced with outlook? | HD | YES / NO |  |
| 4.1.39 | Teachers able to check availability for schools sessions online | HD | YES / NO |  |
| 4.1.40 | Can confirmation email be generated from the system with event detail in main body of email? | HD | YES / NO |  |
| 4.1.41 | Can staff that are allocated to each session receive email notification or notification through outlook diaries that they are booked for sessions | HD | YES / NO |  |
| 4.2 | **Reporting** |  |  |  |
| 4.2.1 | Allows NML to report on all data fields and to combine data fields to produce reports. | HD | YES / NO |  |
| 4.1.2 | Comprehensive set of reports, able to report based on multiple fields | HD | YES / NO |  |
| 4.1.2 | Reports can be exported into multiple formats including Excel and pdf | HD | YES / NO |  |
| 4.2.4 | Number of school children | HD | YES / NO |  |
| 4.2.5 | Number of school children taking part in museum led activities | HD | YES / NO |  |
| 4.2.6 | Number of school children just taking part in general visit | HD | YES / NO |  |
| 4.2.7 | Number of primary schools | HD | YES / NO |  |
| 4.2.8 | Number of secondary schools | HD | YES / NO |  |
| 4.2.9 | Number of further education | HD | YES / NO |  |
| 4.2.10 | Number of higher education | HD | YES / NO |  |
| 4.2.11 | Report on key stages of the school | HD | YES / NO |  |
| 4.2.12 | Number of adult groups coming in | HD | YES / NO |  |
| 4.2.13 | Can report on address & postcode | HD | YES / NO |  |
| 4.2.14 | Can report on Local Education Authority | HD | YES / NO |  |
| 4.3 | **Interface** |  |  |  |
| 4.3.1 | Easy to use, friendly and customisable | HD | YES / NO |  |
| 4.3.2 | Not too many levels appearing but be able to flick between different parts of the information and retrieve information easily | HD | YES / NO |  |
| 4.3.3 | Can easily see availability of different rooms / sessions on different days | HD | YES / NO |  |
| 4.3.4 | Can filter down the venue or activity levels so can look at just one specific area and add in other areas as the booking progresses | HD | YES / NO |  |
| 4.3.5 | Can easily see when a group is cancelled | HD | YES / NO |  |
| 4.3.6 | Can view based on bookings in venue and also on a diary across all venues. | HD | YES / NO |  |
| 4.3.7 | Can interface to Sage X3 financial systems within NML | D | YES / NO |  |
| 4.3.8 | Can keep a record of which groups have paid and which need to pay. | HD | YES / NO |  |
| 4.3.9 | Can automate invoices, take payment by credit/debit card, cash, pay pal | HD | YES / NO |  |
| 4.3.10 | Can store multiple contact names against one organisation | HD | YES / NO |  |
| 4.3.11 | Can store contact details of those booking and track their previous visits to NML. This could be used as basis for making future bookings if details are stored. | HD | YES / NO |  |
| 4.3.12 | Contact data can be extracted to use for communications via letter, mail shots, mail chimp ideally or other mass mail out solution. (please specify). | HD | YES / NO |  |
| 4.3.13 | **Key Information to be captured for each booking:**  **School/Group Bookings**  Booking reference  **School information**  Name of school/group  Contact  Address  School/group Telephone number  School/group email address  Age of children / students  Number of leaders/ adults  Number of children / students  Additional information – special educational needs etc.  Date of visit  Arrival Time  Departure Time  NML venue (with option to add more than one visit)  Activity (with option to add more than one activity)  Room where activity takes place  Activity times  Activity visitors (how many visitors are taking part in each activity at any one time)  Teacher led or museum / gallery led  Name of staff leading the session  **Public programme session**  Date of session  Session start time  Session end time  Room session is taking place  Name of session  Type of session  Session description (can this text be exported into word document or excel formulas for use on website and marketing materials)  Number of participating adults  Number of participating children (under 18s)  Bookings facility - for individuals to sign up | HD | YES / NO |  |
| CRM | | | | |
| **5.1 Overview** | | |  |  |
| 5.1.1 | Simple and intuitive to use | M | YES / NO |  |
| 5.1.2 | Constituents – add, classify and store individuals and organisations of all kinds | M | YES / NO |  |
| 5.1.3 | API with membership database (raisers edge) | M | YES / NO |  |
| 5.1.4 | Able to mail merge from CRM to e-shot via Mail Chimp ideally or other similar mass mail out solution. (please specify) | M | YES / NO |  |
| 5.1.5 | Can store information about a booking - e.g. emails, pdfs, notes | M | YES / NO |  |
| 5.1.6 | Comprehensive set of reports, able to report based on multiple fields Example reports required | M | YES / NO |  |
| 5.1.7 | Reports can be exported into multiple formats including Excel and pdf | M | YES / NO |  |
| 5.1.8 | Able to operate across multi-sited operation | M | YES / NO |  |
| 5.1.9 | Able to identify fields as essential to ensure full data capture | M | YES / NO |  |
| 5.1.10 | Gifts – add and store all kinds of gifts: grants, gifts in kind, recurring gifts, cheques, cash etc. | M | YES / NO |  |
| 5.1.11 | Actions – store all interactions with a constituent | M | YES / NO |  |
| 5.1.12 | Manage Campaigns, funds and appeals | M | YES / NO |  |
| 5.1.13 | Flexible and simple to use queries. | M | YES / NO |  |
| 5.1.14 | Able to sort CRM and select specific category to e-shot, e.g. Art Gallery exhibition visitors, members etc. | M | YES / NO |  |
| 5.1.15 | Batch adding (gifts, actions, etc.) from excel documents. | HD | YES / NO |  |
| 5.1.16 | Global adding and change tool – for example for adding groups of people to events. | HD | YES / NO |  |
| 5.1.17 | Custom configuration e.g. tables, attributes, international address rules, membership customisation, gift letters etc.  Allowing following information to be captured: multiple addresses and contact details, relationships (both individuals and organisations), appeals, notes, gifts (including separation of grants, gifts in kind, recurring gifts, cheques, cash etc.), attributes, media items, actions, honour/memorial details, volunteer details, prospect details, membership details, events. | M | YES / NO |  |
| 5.2.18 | To be able to flick between different parts of the information and retrieve information easily | HD | YES / NO |  |
|  |  |  |  |  |

**END**