

Description	Priority	Please identify your ability to perform this action and a short description of your approach if appropriate
<b>Product Creation and Editing</b>		
Allow quick and easy creation of new product in real time performed by trained in house system administrator	Top	
Editing of all product fields in real time i.e. price, description etc by trained in house system administrator	Top	
Creation of packaged products i.e. family ticket containing 1 adult and 2 children	High	
Ability to create admissions, retail and food products in the same system or module	High	
Allow designing of print at home tickets and confirmations	High	
Allow physical tickets to be printed if required per product i.e. individual tickets on ticket stock	Medium	
Production of tickets for use as print at home tickets per product i.e. a different layout for adult/child variations	Low	
<b>POS</b>		
Compatible with touchscreen for product selection	Top	
Compatible with mouse/keyboard for data collection	Top	
PCI compliant card transactions integrated with the POS	Top	
Capture of Gift Aid on relevant transactions	Top	
Unique, identifiable ticket numbers (barcodes) produced for each admission item sold	Top	
Ability to capture data relating to the customer during the transaction	Top	
Addition of upsells/upgrades per transaction	Top	
Addition of discounts / offers at POS	Top	
Show VAT per transaction on receipts	Top	
Ability to count friends/membership visits and record accurately the visitors on the membership	Top	
Ability to count revisits for year tickets	Top	
Allow £ amount or % discounts of retail and admissions tickets	Top	
Ability to edit basket contents before transaction completion	High	

Ability to record a code alongside a retail product to identify artist of product (to allow for commission to be calculated)	High	
Link discounts and purchases to a membership for data collection purposes	Medium	
Ability to attach guestname to year tickets for future verification	Medium	
POS log in with individual usernames and password	Medium	
Ability to control permissions of team members based on job role and responsibility	Medium	
Easily and quickly change data capture fields presented at POS	Medium	
Ability to look up a year ticket and check validity	Medium	
Collection of data on an ad-hoc basis i.e. take an email address for newsletter sign up at POS during transaction	Low	
Use same log in for back of house functions as well as POS	Low	
Ability to scan membership cards for admission and count attendance from scan without a ticket sale	Low	
Ability to charge to a business account or internal account for staff charges i.e. staff lunch or third party booking	Low	
The ability to email a receipt or simply not print a receipt on request	Low	
Currently the majority of online ticket sales are completed outside of The Stained Glass Museums control i.e. sold via Ely Cathedral. Currently they have a visual check of tickets but would like to be able to import ticket numbers into the system for validation. Is this possible? How would you envisage this working?		

## Timed and Capacity Tickets

Description	Priority	Please identify your ability to perform this action and a short description of your approach if appropriate
Timed and Capacity Tickets		
Be able to sell a date and time allocated ticket at POS and online	Top	
Set a capacity for a single special event i.e. glass making workshop	Top	
Be able to limit pre-sales online and hold back capacity for workshops for those unable to book online	High	
Be able to set a capacity for regular daytime admissions either by timeslot or by overall date i.e. 100 per hour or 1,000 per day	High	
Easily change date/time on tickets in the basket before transaction completion	High	
Be able to accurately, in real-time, see the capacity of a single time-slot for events and workshops from POS and online	High	
Automatically hold tickets that are currently part of another transactions so that you cannot select tickets that are in another transaction/booking awaiting completion regardless of sales channel	High	
Ability to sell tickets that do not require a date or time allocation i.e. gift tickets or open validity tickets	Medium	

Description	Priority	Please identify your ability to perform this action and a short description of your approach if appropriate
<b>Online Sales</b>		
Ability to limit what is on sale and available online without affecting other sales channels	Top	
Allow adding of upsell products and none admission items (i.e. guidebooks) to transaction	Top	
Provide a mobile friendly layout compatible with all screen sizes	Top	
Automatically send confirmation emails or e-tickets to customers on booking completion	Top	
Data collection for marketing opt in	Top	
T&Cs opt in required prior to sale	Top	
Ability to offer Direct Debit or Subscription services online	Top	
Ability to add donations to online ticket purchases	Top	
Links to a CRM system (either internal or integrated) to send communications, update data and link to other data sources on bookings	Top	
Ability to distinguish Gift Aid and none Gift Aid tickets online as per government guidelines - Year Tickets for all guests regardless of GA status	Top	
Ability to differentiate between the person making a booking i.e. the purchaser and the guest who will use the product i.e. gift bookings	High	
Ability to take donations online without ticket purchase	High	
Monitoring of webstore services to notify team when issues arise	High	
Ability to use additional data collection for marketing purposes i.e. pre-visit emails and surveys	High	
Provide a fully integrated webstore	High	
Allow for a basket style transaction journey with customers able to add various products i.e. retail items, donations and workshops to the same transaction	High	

## Online Sales

Ability to integrate to (or offer) e-commerce platform for retail products	Medium	
Ability to add photographs to items within the system and display them online as appropriate	Medium	
Ability to make basic CMS changes without requiring support	Medium	
Ability to add additional charges to transactions i.e. booking fee, P&P	Medium	
Ability to add tracking for items that are posted to orders	Low	

## Memberships and Season Pass

Description	Priority	Please identify your ability to perform this action and a short description of your approach if appropriate
Memberships and Season Pass		
Ability to create various "levels" of season pass i.e. gold/silver and adult/child	Top	
Ability to link passes as a "family" pass or joint membership	Top	
Ability to look up linked passes from any pass within the link i.e. scanning one pass will show all passes within that "family"	Top	
Capture of Gift Aid on relevant transactions	Top	
Ability to search all passes from all workstations	Top	
Capture of marketing consent for individual pass holders	Top	
Reporting on existing memberships	Top	
Reporting on expired memberships	Top	
Reporting on memberships due to expire in X days/weeks/months	Top	
Renewing a membership from all workstations	Top	
Editing a membership from all workstations including replacing card details	Top	
Ability to sell passes from all sales channels i.e. POS and online	Top	
Processing of Direct Debit from all sales channels i.e. POS and online	Top	
Ability to record payments made via standing order	Top	
Ability to record payments taken prior to system implementation (currently in excel and able to be re-keyed or imported)	Top	
Ability to record a member as deceased so as to not contact for renewals etc	High	
Logging a pre-defined membership number from a pre-printed card against the pass record	Medium	
Ability to record freeform notes against membership record at POS	Medium	
Ability to add members without payment i.e. trustees, staff and volunteers	Medium	

## Memberships and Season Pass

Extending (renewing) a pass from all sales channels i.e. POS and online	Medium	
Ability to export contact details for memberships using filters such as "due to expire" or "expired within"	Medium	
Ability to automate communications with members for renewals, newsletters and other communications	Medium	
There are currently around 200 friends who support the museum through the membership scheme however this scheme is due to be relaunched with the new system and all records will be manually entered so no data import or manipulation is required.		
Standing Orders are currently completed using PayPal, going forward The Stained Glass Museum would prefer to use Direct Debit - please provide details of Direct Debit integrations that you would recommend using with your software.		

## Gift Vouchers

Description	Priority	Please identify your ability to perform this action and a short description of your approach if appropriate
<b>Gift Vouchers</b>		
Allow sales of Gift Vouchers online	Top	
Allow sales of Gift Vouchers at POS	Top	
Redemption of Gift Vouchers at POS	Top	
Redemption of Gift Vouchers online	Top	
Gift Vouchers that are expired are automatically invalidated	Top	
Allow sale of Gift vouchers for a single product or service i.e. glass workshop for two	Top	
Report on expired Gift Vouchers	High	
Automatically move revenue from balance to revenue based on expiration or use	High	
Allow sale of Gift vouchers for a value amount i.e. £10 for retail products	Medium	
See what outstanding balance is for current, valid Gift Vouchers	Medium	
Report on Gift Vouchers that are close to expiration	Medium	
Automatically send communication to guests who have Gift Vouchers that are close to expiration	Low	

Description	Priority	Please identify your ability to perform this action and a short description of your approach if appropriate
<b>Hardware and Network</b>		
Ability to provide and support hardware to run POS system	Top	
Be able to provide options for portable POS for remote sales points i.e. pop up retail at christmas events	Low	
Please provide costings for the listed hardware set up with typical requirements for running revenue managment software for the area listed. 2 POS at front desk for ticketing/membership and retail.		
Please provide a description of your network model i.e. cloud based, SQL data centre, onsite SQL hosting.		
The site is currently being upgraded to a higher bandwidth and will be able to support 70Mbps download and 10Mbps upload. Please give an indication if this is adequate to run the software or if further upgrades may be needed and to what extent.		

Description	Priority	Please identify your ability to perform this action and a short description of your approach if appropriate
<b>Support and Training</b>		
Access to unlimited support resources as required	Top	
Support function with "Office Hours" support	Top	
Ongoing Named Relationship Management included in contract	Top	
Ongoing product development included in contract	Medium	
Ability to provide workshops and human lead training sessions for system administrator and super-users (i.e. train the trainer)	Medium	
Ability to provide workshops and human lead training sessions for all levels of the business including front line employees	Medium	
Access to unlimited training resources as required (online/user guides provided)	Medium	
Support function with weekend support	Medium	
Support function 24/7/365	Medium	
Please provide details of any other relationship activities we should be aware of i.e. User Groups, User Lead Development Workshops or regular training schedules?		

Description	Priority	Please identify your ability to perform this action and a short description of your approach if appropriate
<b>Reporting</b>		
Easy creation of reports without specialist training / scripting	Top	
Ability to view a selection of reports at POS for operational reporting i.e. timed admission details	Top	
Production of Z read and X read at POS during Cash Out	Top	
Easy access to balance sheet for outstanding bookings in real time	Top	
Automatic population of a weekly revenue/volume spreadsheet in a format as specified by the business (currently in excel)	Top	
Automatic population of a CSV for import into QuickBooks accounting software	Top	
Reporting for top sellers, most revenue, lowest sellers, lowest revenue over date range	Top	
Reports to run in a timely manner, dependant on data included	Top	
Ability to run reports from a remote location so no onsite access required	Top	
Ability to run reports without impacting on operational database	High	
Reporting on sales revenue against business areas i.e. corporate bookings, evening reception revenue	High	
Ability to feedback over/shorts during cashing up into the system for trend spotting	Low	
What forms of reporting do you have that support the processes above? Are the reports integral to your system or do you propose layering a BI tool on top for example? Please give details.		

Description	Priority	Please identify your ability to perform this action and a short description of your approach if appropriate
<b>CRM</b>		
Two way communication from master database if separate database is used so updates are "most recent" not master database related	Top	
Ability to edit contact details at any POS, Back of House Function or anywhere software installed	Top	
Inbuilt email tool or ability to integrate to mailchimp or similar	Top	
Searching available on all fields with any logical detail i.e. "less than", "more than", partial match on names etc	Top	
Ability to use variable fields to populate list of contacts i.e. "Pass holders expiring one month from today" where data updates daily	Top	
Ability to send post visit emails with survey links	Medium	
Auto-matically highlight duplicate records for investigation and de-duping if necessary	Medium	
Automated emails on daily updated fields so every day emails go out to "Pass holders expiring one month from today" for example	Medium	
Tracking memberships against purchases i.e. discount used in the retail areas links basket contents to membership	Medium	
Ability to integrate other data sources i.e. wi-fi sign up or newsletter sign ups	Low	
Ability to highlight "interests" for future marketing preferences i.e visited santa tour in 2019, email about tour in 2020	Low	
Please provide costings for CRM usage per user/license/log in as appropriate for the CRM software - please expand in you response if appropriate.		

Is your CRM system built into your own software, fully integrated to another module of software you own/operate, a third party product which requires middleware from the POS system i.e. salesforce or other? Please give details.	
Are you able to integreat to Microsft Dynamics? Or output to CSV for importation to Microsoft dynamics?	