

Spend less time on administrative tasks and more time filling your classes and giving your students the attention they deserve. Increase your education program volume with less effort and get paid faster through Easy-Ware's integrated education tools.

In addition to complete fundraising capabilities, Total Info includes a full education management suite, designed specifically for non-profit organizations that offer educational programming as part of their missions. Developed in consultation with dozens of after-school programs, children's theatres, arts academies and education professionals, Total Info accommodates a wide variety of program types, from Classes and Camps to Private Lessons and Residencies.

Looking for a better solution? Only Total Info allows you to see fundraising and education involvement together for every constituent and across every family throughout your system. Total Info goes beyond basic fundraising and education solutions, giving you the tools you need to help you reach and exceed your budgeted goals efficiently and effectively.

### **One Integrated System**

Too often, growing non-profits haphazardly develop or acquire data management systems by function or necessity. They wind up using multiple spreadsheets and databases full of redundant, un-shareable information and wasting time and money attempting to synchronize and de-duplicate disparate databases. Easy-Ware provides a single, integrated solution for every department. Total Info is an enterprise-wide information system that allows every staff member to work with the same information, eliminating duplicate data and significantly improving efficiency across all departments.

### **Family-Friendly Design**

Unlike many fundraising systems that use "households" or education systems that are student-centered, Easy-Ware's unique family-oriented data design is ideal for non-profit organizations that need comprehensive fundraising and offer educational programs. Our family design saves individual records for parents and children together in one family group and can elegantly handle complex family situations that many other solutions simply can't, such as divorces, non-traditional families / guardians, family members with different last names, seasonal addresses, personal e-mails and cell phones for each family-member and other modern challenges.

As a comprehensive CRM solution, Total Info allows you to see an entire family's total involvement at a glance. You can also manage and observe the evolution of a constituent's activities - from Child Program Participant through Alumni, Volunteer, Donor and eventually Parent of a new Child Participant - without ever deleting, re-entering or duplicating the record.

### **Accommodate a Wide Variety of Programming**

Whether you offer a regular slate of classes, occasional educational programs or a handful of private lessons, Total Info's education management solution is designed to handle your most complex programming needs. Create unlimited programs of various types (classes, camps, residencies and lessons), copy programs from term to term, edit details (date/time, location, instructor) for individual

sessions and easily accommodate any schedule or instructor changes. Total Info can help you manage private lessons, day and summer camps and teacher/artist residencies at other locations.

### **Handle More Volume with Less Effort**

It's a common story among non-profit education programs: as program offerings, registration volume and administration needs increase, the education staff remains the same. In some cases, programming becomes limited by available resources. Total Info streamlines your most time-consuming administrative processes (registration, billing, collections, etc.) and helps you get more done in less time and offer more programs without adding additional staff.

Through Total Info's comprehensive registration form, you can sell multiple programs in a single transaction, add a donation and/or product purchases and easily apply fees, discounts, scholarships and vouchers. Total Info sends summary acknowledgements, invoices and reminders by e-mail to the buyer as necessary.

### **Discounts and Scholarships**

Total Info accommodates all types of discounts, including complimentary registrations, and helps you track the costs of your discount policies. Forgotten or overlooked discounts can be easily applied after a sale, and a refund can be issued for the difference.

Full or partial scholarships can be used to pay for programs for students who qualify, and scholarship amounts can be awarded to families as a credit to be used as best suits their needs. Scholarships are handled discreetly so that financial aid information is known only by school administrators.

### **Sell More than Just Classes**

Total Info allows you to sell products (class supplies, t-shirts, uniforms, chorus robes, scripts, textbooks, CDs, DVDs, etc.) alongside your program registrations. If appropriate, you can also sell any type of membership with your registration. Total Info can handle a variety of different types of fees, such as fees to offset credit card and handling costs or a non-refundable registration fee, as well as allow you to take a donation with a registration.

### **Drop-Ins and Wait Lists**

Total Info supports drop-in students, wait lists and unpaid reservations, all of which can be easily converted into full-time registrations and enrollments. Set up drop-in fees that create a part-time enrollment, allowing drop-in students to appear on sign-in sheets and rosters and facilitating an upgrade to full-time status. When a program fills up, you can easily add parents and students to a wait list.

### **Emergency Contacts and Authorized Pick Ups**

For youth and after-school programs, gathering and recording emergency contact and authorized pick up information is essential. Total Info allows you to add these people to your database as their own

records then link them to the appropriate child. Because they have individual records in your database, they can be included in marketing mailings and fundraising appeals, if desired.

All contact and emergency information for students can be immediately accessed from the education dashboard. A complete emergency contact report can be run for a single child, all children or children with a specific affiliation. A list of authorized pick ups with photographs can be easily generated by student, by class.

### **Education Dashboard**

Total Info concentrates all workflow in a unique, easy-to-use dashboard that lets you keep track of all your students and families and easily add, view and edit information. Total Info accommodates multiple family addresses, unlimited phone numbers and e-mail addresses and emergency contacts and authorized pick ups for child students. Enrollment and registration histories for all family members are tracked and viewable through the dashboard, allowing you to quickly check for prerequisite and/or dropped classes as you process new registrations.

The education dashboard allows you to see your full transaction history by type, date, family, payment method, user, etc. Reprint invoices or resend acknowledgements with the click of a button. Complex cancellations, full or partial refunds and exchanges are accomplished in a few simple steps.

Total Info's education dashboard also gives you easy access to general program information (instructors, location, class schedule) as well as program availability, enrollees, wait lists, registration transactions and balances due. Hold any number of spaces in a program and view an inventory of filled, open and held enrollments at any time.

### **Track Important Information with Enrollment Histories**

An education transaction in Total Info creates two records: a sales transaction/registration record and an enrollment record associated with a student. The person paying for the registration does not have to be the student. Enrollment records capture a snapshot of detailed personal and demographic data for a specific student in a specific program at the time they were enrolled. Enrollment data includes age at the start of a program, school, grade, race/ethnicity, gender and more.

Total Info makes it easy to see enrollment histories during both the sales and the registration processes, allowing you to quickly check for prerequisite and/or dropped classes as you discuss programming options and/or enter new registrations.

Using this enrollment data, Total Info automatically categorizes students as either new or returning, allowing easy reporting on the ratio of new vs. existing students for each program and term.

Most importantly, enrollment data is often required by funders. Grant funding is a primary source of support for non-profit programs, and accurate reporting is an essential component of continued grant support. With Total info, tracking and reporting on the enrollment data you need has never been easier.

### **Flexible Payment Options**

Total Info accommodates a variety of payment methods, including all major credit cards, comps, vouchers or branded gift cards. In addition, Total Info lets you create flexible payment plans that allow for multiple payments and/or payment methods. Total Info's payment plan feature allows you to specify payment schedules and automatically set reminders for when payments are due.

Integrated credit card charging eliminates duplicate data entry, and instant validation prevents fraud or other losses. Immediately acknowledge payments with customizable, automatic e-mail confirmations.

Set up automatic payments with references to stored credit card information, stay on top of expected payments and track overdue payments. E-mail or print personalized reminders, invoices and payment acknowledgements directly from Total Info.

Total Info also allows for easy payment allocation for accurate income accounting.

### **Easy Online Registrations with Optional Donation**

Online registrations save time by significantly decreasing the number of registrations you process internally. Through our partnership with PrintTixUSA, Total Info offers an easy-to-set-up, easy-to-use and fully-brandable online registration tool. Our registration form is seamlessly integrated into your website, maintaining its menuing, look and feel.

No tedious and expensive web site editing is required to set up your programs for sale online. All program content (name, instructor, cost, location, age range, dates, times, description, etc.) is loaded directly onto your site through a single synchronization with Total Info, and a dynamic program list is presented for buyers to choose from.

To simplify the purchase process, online buyers are not required to log in with a username and password; however, buyer contact information is saved for reuse and can be recalled by entering an e-mail address.

To prevent overselling, the website registration form is linked directly with your Total Info data file and spaces are locked as soon as registration has begun. Total Info also lets you hold and release spaces in programs sold online, allowing you to reserve inventory and prevent classes from selling out online.

At the end of an online registration, there is an optional donation which presents a choice of fixed additional donation amounts or amounts that round the transaction up to a targeted total. The registration and donation will appear as two separate transactions on the buyer's credit card statement, and two separate, custom e-mail confirmations will be sent.

Our fully PCI/PA-DSS compliant online registration solution uses your own merchant account to process payments and deposits gross payment amounts directly into your bank account within two business days. The 1% transaction fee is billed monthly as a separate business expense. At this time, online payments can only be made in full; we don't allow for down payment or partial payments with online registrations.

After the sale, all registration information (including student name, gender, date of birth and up to two emergency contact names) is directly imported to Total Info. Prior to creating the sale in your database, Total Info's unique matching feature checks buyer, student and emergency contact information against your existing records to find exact and possible matches, preventing duplicate records and eliminating redundant data entry.

### **Alternative Online Application/Interest Form**

For programs that require administrator or teacher approval, have specific pre-requisites or are not likely to meet the minimum enrollment level, we offer an online interest form through our partnership with FormSite.com that allows your buyers and students to sign up and express interest in these types of programs without requiring a credit card payment. Program, buyer and student information is downloaded directly into the Total Info database, allowing you to create a registration awaiting payment if you approve the application.

### **Facilitate Refunds and Exchanges**

The need to cancel, refund and/or exchange program registrations is one of the most challenging aspects of offering educational programming. Total Info's refund and exchanging tools allow you to easily cancel, refund and/or exchange registrations through a simple process. Full or partial refunds can be made back to the buyer's credit card, by check or to a credit. The exchange process allows for payment or refund for the difference of registration fees. A full audit trail is created for accurate accounting of these changes, and dropped registration statuses, reasons and notes are saved in the student's history.

### **Prepare for Classes and Track Attendance**

Total Info provides educators and administrators with effective tools for tracking attendance and participation. Easily print standard or custom rosters and sign-in sheets for each or all program sessions. Teachers can record each student's attendance by session and view/print comprehensive attendance summaries. Administrators can enter attendance by session with just a few mouse clicks.

Total Info's custom reporting tools allow for a wide range of program preparation requirements. For example, you can easily generate a list of students by t-shirt size or print student labels with program name and t-shirt size.

For programs that need to track facility entrances and exits, Total Info offers a quick check in/out feature, allowing you to know at all times the facility access status of all students.

### **Keep in Touch with Parents and Students**

In non-profit education, the ability to communicate with families and students and respond to last-minute program changes is essential. Total Info lets you quickly send out individual e-mails and targeted e-mail blasts by program or to any group of parents and/or students. Send e-mails to welcome students, notify participants of program changes and market the next term's offerings directly from Total Info.

Total Info can also feed targeted lists to third-party email solutions such as Mail Chimp, Vertical Response or Constant Contact for larger, specially-formatted e-mail blasts.

### **Comprehensive Management, Marketing and Financial Reporting**

Reporting on your education programs has never been simpler. Easily run reports showing payments received, balances due and fees, discounts and scholarships applied by program, by term. Track teacher costs and fixed costs vs. income for a net income summary of each program by term. Create any number of custom reports focused on classes, teachers, students, terms, locations, etc.

Collect marketing information on a program by program basis (How did you hear about this program?) as well as on a student intake basis (How were you first introduced to our organization?). Evaluate your marketing strategies and increase registrations by identifying and focusing on your most effective methods.

Summarize income by accounting system account and class for easy posting to your financial accounting system.

### **Grades and Teacher Evaluations**

Easy-Ware is currently expanding Total Info's education functionality to include grading and teacher evaluation. Teachers will be able to input grades and evaluations for each student into Total Info from anywhere, at any time. Evaluations and 'report card' forms will be able to be printed or e-mailed directly from your database.

### **Going the Extra Mile**

Don't see something you need? Easy-Ware offers custom development services to make sure you have all the features you need to fulfill your mission. We often don't charge for enhancements that will improve our solution for the next customer. However, if your needs are unique, our custom programming work is priced affordably, like the rest of our product suite.