

# Program Registration

CSI Software's Program Registration module for Spectrum NG is designed for facilities that wish to register individuals into programs or classes. It fully integrates with all of the other CSI Software modules, giving the organization one seamless, fully integrated application that can manage all of your business needs.

There are five levels of hierarchy to the Program Registration module, allowing the organization to design and specify their activities and programs according to their needs and preferences as demonstrated below. The flow of creating programs is intuitive and easy to do.

Registering a person for a program is easy. Because of the hierarchy developed for this program, you can search for a program by either site, session, category, course or the specific program itself. This offers the organization incredible flexibility. Once you select a program, all its relevant information will appear. At a glance the organization will know when it starts, days, time, how many customers have registered, instructor and availability, to name a few. Furthermore, specific warnings will appear if the customer doesn't meet the age or gender requirements. Also, all fees associated with the program will be displayed, including the option of pro-rating fees if the program has already begun.

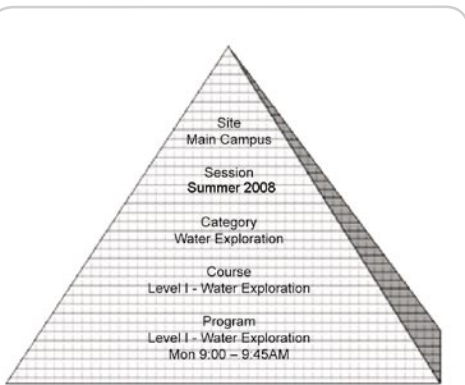
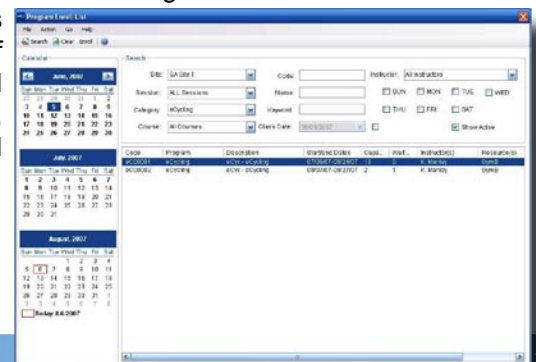
## PROGRAM SETUP

**Session Setup** includes the ability to create registration start and end dates. You can also clone or copy sessions allowing you to avoid the tedious and time consuming task of re-entering the details of your courses and programs your organization regularly offers every session.

**Category Setup** allows you to create categories for your programs. Program searches and reports can be organized by category.

**Course Setup** is used to set up minimum and maximum ages, gender requirements, prerequisites, popup notes, program details, instructors, resources (location of program) and all fees. Once this information is created, you never have to change it again. You can also create course codes as well as rules for payment and enrollment.

**Fees Setup** gives you the flexibility of creating fees for members or non-members, even by membership type. Early bird fees (two levels) can be set up. You can also prorate fees based on when the program starts and the system automatically makes the calculations at time of enrollment. Future one-time or repetitive fees allows registrants the option of paying for programs at a later date or over a range of dates. Extra fees can easily be added for such things as materials and supplies. Cancellation fees and rules can also be created. And because all of CSI's programs are fully integrated, all fees flow automatically to Point of Sale, Accounts Receivable, and the General Ledger.



## Summary of Features

- Five level hierarchy
- On-line registration
- Email registrants
- Clone/copy sessions
- Registration start and end dates
- Maximum and minimum class sizes
- Targeted # of registrants/attendees
- Waiting lists
- Resources
- Instructors
- Age requirements
- Gender requirements
- Prerequisites
- Member/non-member fees
- Repetitive or future fees
- Cancellation fees and rules
- Automatic proration of fees
- Extra fees
- Early bird fees (two levels)
- Accept deposits
- Popup notes
- Program details
- Search for programs by site, session, category, course, or program
- Advance search by date, day of week, instructor, or keyword string
- Group and household registration
- Look up programs by individual
- Print waivers
- Set up user defined fields
- Create cancellation codes
- Bus routes
- Transfer from one program to another (with calculation of fees)
- Enter enrollment notes
- Integrated with accounts receivable and general ledger

**Program Setup** is where you set the dates and times of the program as well as the minimum and maximum program and waiting list sizes. You can even create targeted number of registrants for any given program. When you create a program, you can drill down to each individual class and change the date, time, instructor, and/or resource. Programs can be cancelled (with automatic email notification) and re-instated.

## SELECTING A PROGRAM

You can search for a program from any site. You can search for programs by site, session, category, course, or program. Advance Searching allows you to search by date, day of week, instructor or keyword string. You can also have the cursor default to any one of the above fields to make selecting a program easy. Program start date, end date, maximum size, enrolled, and waiting list size information are displayed.

Registration start date, resource, instructor and all fees associated with the program are immediately available. You can search for programs an individual has enrolled into by selecting the program look-up feature. You can also leave messages for specific individuals for when they register for programs.

## ENROLLING A CUSTOMER

The Program Registration module offers many methods of retrieving or searching for a customer's name. If they are a member, you can search by number or name. If they are non-member, you can search by name or telephone number. You can also add members or guests "on the fly".

If the customer is too young or old or doesn't meet the gender requirements, an appropriate warning appears. If the program is already full, you can automatically assign the customer to a waiting list for the program or (with Managerial Control) enroll an individual into a program that is already full. You can also transfer from one program to another and the system will automatically calculate the difference in fees.

You can seamlessly move to Point of Sale with the click of a button. All appropriate fees are listed without any searching necessary. If you want, you can use the Bulk Pay function which allows a registrant to pay for all unpaid programs at one time. This is particularly useful when you have a large family registering for a number of programs at the same time.

Program Registration registers or withdraws the customer, adjusts the roster and available spots for the program and charges or credits the customer the appropriate amount. All of these functions are done automatically. Because Program Registration is integrated with the other CSI Software modules, all transactions flow directly to Accounts Receivable and the General Ledger.

- Enrollment Notes
- Cancellation Codes
- Print Waivers and Receipts
- Accept Deposits
- Bus Routes
- User Defined Fields

## Online Registration – Reduce Costs and Increase Revenue!

CSI Software now offers online program registration. Through a link on your website, this service offers real-time registration. There is no importing/exporting or synchronization of data. You can control the start and end date of on-line registration, which courses can be offered, and how registrants are to pay. You can also set up different fees for customers that register over the Internet. Online registration reduces barriers between your customers and your programs – driving to each facility to register for programs, line ups, and phone calls will become a thing of the past.

## About CSI Software

CSI Software is the leading provider of membership management software and services designed for health and fitness clubs, campus recreation centers, wellness centers, JCC/YMCA/YWCA organizations, and parks and recreation departments.

For more information logon to [csisoftwareusa.com](http://csisoftwareusa.com)

