**The Cheerleading Company Database requirements**

**Overview**

We sell dance themed hen party experiences nationwide. We have a team of approx 15 freelance coaches, delivering dance classes to hen party groups. There are currently 10 different party themes available in 20 different cities across the UK.

We need a database to help manage bookings, of which there are approx 100 inquiries per month which convert to approx 60 bookings. For each inquiry/booking, customers choose the city, date, time and party theme, plus the number of guests attending. We then have to check availability, allocate a hen party coach, and a book venue, send a contract & invoice to the customer, track payments etc.  
  
We will therefore need to store the following data:  
  
**CUSTOMER/BOOKING** (approx 1,500 records per year):

Note #1 about customers – because it is for a hen do, it is more a one off purchase than ongoing business. It is quite rare for a customer to use us twice within a year. So in some ways, the ‘customer’ record is almost the same as a ‘booking’ record.

* Event Organiser name if applicable (see section on Event organisers below)
* Event organiser booking reference (see section on Event organisers below)
* Customer contact details (contact name, phone, email),
* How they found us? (e.g. google search / through pineapple dance studios / a friend did a party with us / Wedding exhibition etc)
* Booking requirements (date of party, timeslot, city, theme, number of guests (see note #2 below), any special requirements e.g. this is for a 30th birthday),
* Quote – see note #3
* Booking status i.e: (ideally with option to set reminders). Below is an outline of the main steps in the process:
  1. query received
  2. quote sent (within 1 working day)
  3. ( if no response to the above within 1 week) follow up email sent
  4. Request to book received
  5. booking form & invoice sent (within 1 working day of receipt of above)
  6. form & deposit received (within 1 week)
  7. balance reminder sent (3 weeks before party)
  8. balance paid (2 weeks before party)
  9. final confirmation sent (within 1 working day of receipt of above)
  10. party completed
  11. post party email sent (within 1 week of delivery of party)
  12. feedback received
* space to write notes on interactions e.g. she called on 15th sept but is not looking to book until end of nov etc
* allocated hen party coach (inc. name of coach, tracking when this has been booked, and when a job sheet has been sent)
* allocated venue (inc. name of venue, tracking whether this has been booked, and with whom, and flagging up if advance payment is required)
* payment details (inc. invoice number, invoice amount, record of payment received including: amount received, date received and payment method). Usually we receive a deposit, then a balance, but sometimes (1 in 5) make an additional interim payment because they add extra guests.

Note #2 about customers/booking – there needs to be some flexibility in ‘number of guests’ and payment. Often, because it is a hen do, people book for about 12 guests and pay a 50% deposit for this number. Then, nearer the time they will add extras, or some people will drop out. So we need to be able to record this in the database, and reflect it in the payment section.

Note #3 about customer/booking – we need to include rate quoted. Usually it is £30pp for groups of 10-19 and £25pp for groups of 20 or more. However, we nearly always have offers running so depending on when the query is received, different customers will be on different rates. I guess we need to include details of the quote & the expiry date.

**EVENT ORGANISERS (EO’s)** (approx 10-20 records)

At the moment, the majority of our customers come to us directly. However, we are now starting to use Event Organisers (EO’s) which are basically companies who sell hen party packages, and outsource the dance class section of the package to suppliers like us. For 2011, we expect 30% of our hen party bookings to come through EO’s. So, we would need to store data on EO’s as follows:

* Company name, address, website, email, phone
* Name of sales person & contact number / email (sometimes there are 3 or 4 different people in one company who might book us)
* Service agreement (i.e. rates)
* Payment terms (e.g. full payment required 2 weeks in advance)
* Space to write notes e.g. this company only uses us for Fame and Grease parties

**COACHES** (approx 15-30 records):

* contact details (name, phone, email),
* rate of pay
* cities covered & related travel costs
* space to write notes e.g. themes covered and insurance renewal dates etc

**VENUES** (approx 40-50 records):

* contact details (venue name, address, contact phone, name of studio manager),
* availability (studio timeslots / opening hours),
* cost of studio hire (sometimes there are two or three rooms available so there might be 3 different rates)
* payment terms – usually coaches pay on arrival but occasionally (1 in 10) advance payment is required
* notes about the facilities (e.g. spa facilities available / studio fits up to 14 people)

**THEMES** (approx 10-15 records)

* Party themes (e.g. Cheerleading, Dirty Dancing, 80’s...)
* Associated gifts / kit requirements (each theme has a different gift for the bride, usually a bottle of champagne & a DVD)

**Functions I would require include:**  
1. Ability to search for and pull up a specific booking / inquiry and view all info relating to this booking including date, time, theme of party, no.guests, billing status, allocated venue, allocated coach etc.  
  
2. Ability to view a calendar of all upcoming bookings & queries including notes on the booking stage (query / quote sent / form sent...etc), coach & venue status, payment status.

3. Ability to search for / pull out a report of upcoming parties by date / venue / coach  
  
4. Ability to create booking forms & invoices for customers and job descriptions for coaches using customisable templates.

5. Ability to track invoices & payments with reminders of when payments should be chased etc

6. Measurability – ability to provide certain statistics, mainly on conversion rates. For example, it would be interesting to be able to measure how many queries I have received in a month, and how many of them have converted into bookings, and what the value of those bookings is. It would be useful to be able to get the conversion rate for a specific city, or for a specific theme, or for a specific sales person.

I suppose it just needs to be able to tell me: How many bookings/queries/non-bookings for a certain city/date/staff member/coach/EO/theme over a certain period of time? I would need to know both the volume of bookings and the financial value of the bookings.

7. Ability for the hen party coaches in the different cities to be able to update their availability onto a calendar so that I know who is available on a certain date, who is booked to work, and who is on holiday / busy. I am currently using the hotmail calendar for this, and transferring all of the bookings onto the calendar and updating them manually so it would be good if this could be incorporated into the database.

**Finally:**

I also need the database to allow multiple people to work on it at any one time on a network. For each booking, I would need to be able to see the name of Cheerleading Company staff member dealing with this customer (don’t know if users have different ID’s so this can be recorded automatically?)

It would be good to be able to have remote access to the system if working from my laptop in another city. So being able to access the database online?

My operating system is Windows 7