Foxtrot CKS | NDIS | Link Up

Overview *as at July 2022*

Introduction

Stepsoft Pty Ltd, founded in Canberra in 1998, is an independent professional software development company specialising in hosted ('cloud computing') online membership and client management systems. The **Foxtrot Customer Knowledge System (CKS)**, developed by Stepsoft, is at the core of our wide range of systems solutions and integrated online services. Foxtrot is provided as a 100% 'cloud computing' service and is fully and professionally managed by Stepsoft in Australia.

Foxtrot CKS is a component based, modular, highly flexible and adaptable system suited to any micro, small, medium or large organisation for the management of the *activities of* and *relationships with* its clients, customers, participants, members, volunteers, teams, players and other individual and organisational stakeholders.   As a pure web-based system with a server-centric architecture, Foxtrot CKS is designed to be delivered efficiently over the Internet as a hosted cloud application.

Foxtrot NDIS is a purpose built version of Foxtrot CKS for registered NDIS Providers. It allows NDIS providers to manage all aspects service delivery to NDIS Participants including NDIS Plan Management, support service delivery and support notes, appointments and scheduling, rostering and timesheets. It also includes comprehensive and fully integrated billing features to automate the process of invoicing plan and self-managed Participants, and for bulk upload of claims data to the NDIS Portal, for agency managed Participants.

Foxtrot *for* **Link Up** is a purpose built version of Foxtrot CKS for Link Up organisations nationally that allows them to manage services and support provided to members and affected families of the Stolen Generations. It allows Link Up organisations to record and report on detailed information about services delivered including counselling and support services and family re-unions.

Stepsoft utilises **Amazon Web Services (AWS)** as its hosting infrastucture. AWS is the world's leading IaaS (Infrastructure as a Service) provider ensuring that Foxtrot is available to all users 24 hours a day, 7 days a week. AWS also provides maximum scalability for Stepsoft allowing Foxtrot CKS to be ideal for the smallest or largest of organisations.   Whether your organisation has 10 customers and 1 staff member or 1 million customers and hundreds of staff makes no difference, the system will handle all sizes. Pricing is based on equity, so smaller organisations will pay less.

Note*: For the purposes of this overview "Foxtrot", "Foxtrot CKS", "Foxtrot NDIS", "Foxtrot Web" and "Foxtrot Cloud", while having some technical differences, are one in the same and the terms are used interchangeably.*

Standard Foxtrot Modules

Choose from any of the following standard Foxtrot modules when configuring Foxtrot for your organisation:

Customer Module

Manage anything and everything to do with your Customers/Clients, Participants, Members, Associates, Team Members, Players, Volunteers, or other contacts. Maintain all contact details, record detailed notes, attach documents, audio and video to customer records and much, much more. In Foxtrot a 'customer' is a generic term and can be a member, a participant, a client, a player a student, a patient, a stakeholder, a volunteer, a staff member, an organisation, an institution, or any other type of person, entity or organisation.

Customer Relationship Management (CRM)

Foxtrot Web comes standard with a range of fully integrated Customer Relationship Management (CRM) and Contact Management features including:

- *Ability to record detailed contact information*
- *Ability to track all activity or service delivery against a client record*
- *Ability to define events and tasks against a customer/member record and to set reminders*
- *Ability to allocate tasks to one or more staff members*
- *Maintain a detailed history of all interactions and communications with Customers*
- *Communicate quickly and effectively with one or many or all client records via a variety of methods*
- *Send email, e-Newsletters and other electronic correspondence to nominated groups of Customers quickly and easily.*

Configurable Custom Data Module

Create new fields and forms for collecting any additional data about your customers or members. Foxtrot's unique Customer Data Module allows the system to be expanded and custom configured to suit any specific data requirements. It allows the system to be expanded quickly and easily without the hefty cost of software development. When fully implemented, Foxtot will behave and feel like custom built software.

Advanced Group and Individual Messaging

Quickly and easily create and send messages via email, SMS and e-Newsletters directly from Foxtrot Groups, or individually. Send personalised bulk messages via inclusion of optional tags in the message content. Save messages as templates for later use, including HTML & PDF newsletters. All messages sent using Foxtrot are saved in the 'message history' ensuring that a complete history of all communication with groups and individuals is maintained. Foxtrot is integrated with MailChimp to provide world's best service for bulk mail delivery, directly from Foxtrot.

Financial Management

Foxtrot Web comes with a comprehensive Debtors Management and Accounts Receivable module to handle all payments due and collected. Foxtrot has its own internal chart of accounts and also supports the following (optional) integrations and interfaces:

- PayPal
- Securepay
- IntelliSMS
- MYOB

- Xero
- BPay
- Telstra Postpay
- Direct Debiting / Automated Periodic Payments
- Oracle Financials interface
- Interfaces to other popular online services are also under development or consideration

Recurrent Billing (r-Billing) Module / e-Renewals

The Recurrent Billing (r-Billing) module allows for periodic invoices to be automatically created based on the client profile or defined billing rules. Billing can be done quickly and easily with a few mouse clicks on a monthly, quartely or annual basis, or by fixed installments or by other period as required. Tax invoices, once generated, can be automatically emailed to recipients who can then pay quickly and conveniently online. R-Billing comes with a Debtors Ageing report and allows for Reminders for overdue accounts to be sent quickly and easily by email.

Online Events Management

This module allows for Members and others to quickly and easily register for and (if applicable) pay for attendance at events such as dinners, workshops, presentations, etc.   Events are quick and easy to define and appear within the Online Zone (OZone) for secure, rapid registration and payment. Administrators can easily manage events, peruse event registrations, set a budget, quickly account for all of the funds received from events and quickly determine the profitability of the event.

This module recently underwent significant expansion to allow for 'public' events, the ability to publish an event to a Publicly searchable Events Calendar, the ability to promote an event via various channels, the ability to create a shared Events Calendar, and much more. These features are now available.

Simple Online Surveys

This module allows for Members and others to quickly and easily respond to simple online surveys. While Foxtrot has existing capabilities for online surverys, this area is under review currently and due for further development and expansion in the coming year. We would welcome specific requests from our users in relation to this requirement.

Calendar and Tasks

The Calendar and Tasks module provides a fully integrated calendar for setting events and defining tasks against a client or staff record. Calendars can be viewed in many different ways and reminders can be set for events and tasks as required. Reminders can be allocated to multiple staff who will each receive the reminder SMS, email or pop-up (as defined at the time of setting the reminder). The Calendar and Tasks module is also fully integrated with the exetnsive Notes features of Foxtrot.

Notes & Activity Recording

Foxtrot allows for unlimited notes to be entered against a client or staff record. Notes can be descriptive or can be used to record an activity or service delivered. Notes can be as detailed as required, are date and time stamped and available in a consolidated form via the Notes module. Foxtrot Notes can be configured to record different types of Notes and Activities, who performed the activity and how much time was spent on the activity. Notes data can also be used to drive reports and other processes in the system. Notes can also be converted to Tasks and email, SMS or pop-up reminders set and allocated to one or many Foxtrot users.

Documents, Notes & Multi-media

In addition to the extensive Notes features, Foxtrot allows for any document, image, audio or video file to be attached to a client/customer record. This allows for as much information as required to be stored against a client. Some examples may include: scanned copy of residency visa, qualifications evidence, health certificates, client photos, client contracts, site photos and videos, etc.

Relationships

The relationships module allows for relationships between any two customer records to be defined and maintained. This includes family relationships but can be used to maintain any important relationship including those relating to: employers, sponsors, mentors, friends, volunteers, etc. Relationships can be viewed in a variety of ways. Relationships can also be added one at a time or many at a time through time saving features sucn as *mutli-relationship allocation.*

The OZone module (The Online Zone, or OZ)

This online portal provides secure online access to "OZ Members only" functions and provides a range of online benefits including the ability to:
- Update own contact details such as Name details, address, email, phone and other contact information
- Pay Membership Renewals and other invoices
- Register and pay for Events and see own Event history
- Receive (securely) information shared by the host organisation
- Share content, information and messages with other OZone members or with the host organisation
- Complete online surveys *(coming soon)*
- Set Privacy settings
- View past and present Roster(s) and update availability/non-availability profile
- Access other Member / Client only information
- Make payments and donations online
- Integration with Social Media sites including Facebook, Twitter and LinkedIn
- Participate in online blogs & discussion forums *(coming soon)*
- Buy merchandise from the online store *(coming soon)*

Please Note: The OZone is currently under significant and continuous expansion and will soon include an iPhone and Android App for OZone users, amongst many other additions and improvements.

Foxtrot Sharing

This optional module of Foxtrot is an online and private service that allows for staff and other registered users or stakeholders to upload and share information with each other in a completely secure way. Access is restricted according to a user's security profile and any type of information can be shared online. Such information could include: documentation, manuals, policy documents, board minutes, meeting minutes, photos, videos, etc. The nature of the material uploaded is up to the the host organisation's administrators and to users of OZone. The OZone can also be configured by region or location or other category and access rights restricted in accordingly. Data audit trails are also maintained on all information uploaded and downloaded. The OZone module of Foxtrot is currently undergoing significant expansion and will soon included a wide variety of other features including an online store, the ability to engage in online forums and much more.

Foxtrot for NDIS

A purpose built version of Foxtrot for NDIS Service Providers, offering everything in one system to effectively and efficiently manage anything and everything to do with the delivery of services to NDIS Particpants. Includes comprehensive features for Participant Plan management and Service Delivery

including the ability to handle Plan, Agency and Self-Managed Plans. Other features include: comprehensive File and Case Note features, audit histories and audit tracking, plan management, budget management, appointments and scheduling, Xero or MYOB integration, rostering and timesheets, and much more.   Foxtrot NDIS is the perfect, highly adaptable (and very affordable) system for small, medium and large NDIS service providers.

Rostering & Timesheets

Quickly and easily create and disseminate work Rosters for staff and/or volunteers. Staff and volunteers receive their Roster by email or via the online portal and can elect to receive SMS reminders. Managers can set, manage and monitor tight budgets in real time as the Roster is being created.   Staff and Volunteers can enter timesheets online via the OZone and managers can approve and report on timesheets with ease and speed. Includes time sheet management and interfaces are currently being considered for a number of popular payroll systems. Integration with Xero currently under development and due for completion by the end of 2018.

Appointments & Scheduling

Quickly and easily create new client or Participant and client appointments and manage schedules for locations, practitioners and participants. Set automated client alerts and reminders for staff. Record notes and link activity with billing requirements. Manage scarce resources efficiently.

'Foosteps' Service Request / Case Management

Footsteps, developed originally as Stepsoft's own internal help desk, case and service contracts management system is now a fully integrated module within Foxtrot. This sophisticated module allows detailed management and tracking of any case or service request. Track all requests, prepare quotes, allocate tasks to the appropriate staff member, record all time spent and then create and send an invoice. Keep the client informed via automated email updates and activity reports. This module suits any organisation involved in service delivery and/or support provision.

Virtual Organisations: Supports Multiple Affiliated Groups

Foxtrot's powerful 'Virtual Organisations' feature is unique. It allows for many affiliated organisations or groups to effectively share the one database system while simultaneously maintaining autonomy and independence. Each user of Foxtrot can be granted access to one or many registered Virtual Organisations. The sophisticated security features of Foxtrot ensure that users are only able to access data and system services which they are authorised to access. The ability to simultaneously manage multiple affiliated organisations provides huge efficiency and other benefits for groups of affiliated organisations, including corporate view and roll-up capabilities for 'National Office'. It also provides significant savings since one license fee and one system can cover the needs of many affiliated groups.

Advanced Reporting and Dashboards

Foxtrot provides a wide range of standard reports, ad-hoc query facilities, data export facilities and dashboard reports. Custom reports and dashboards are also easily created and added to the system as required. Below is an example of an existing dashboard report for one Stepsoft client. Note that dashboard dimensions can be created to suit specific requirements (e.g. revenue by month, staff hours by client, etc):

Dashboard - Sample Only
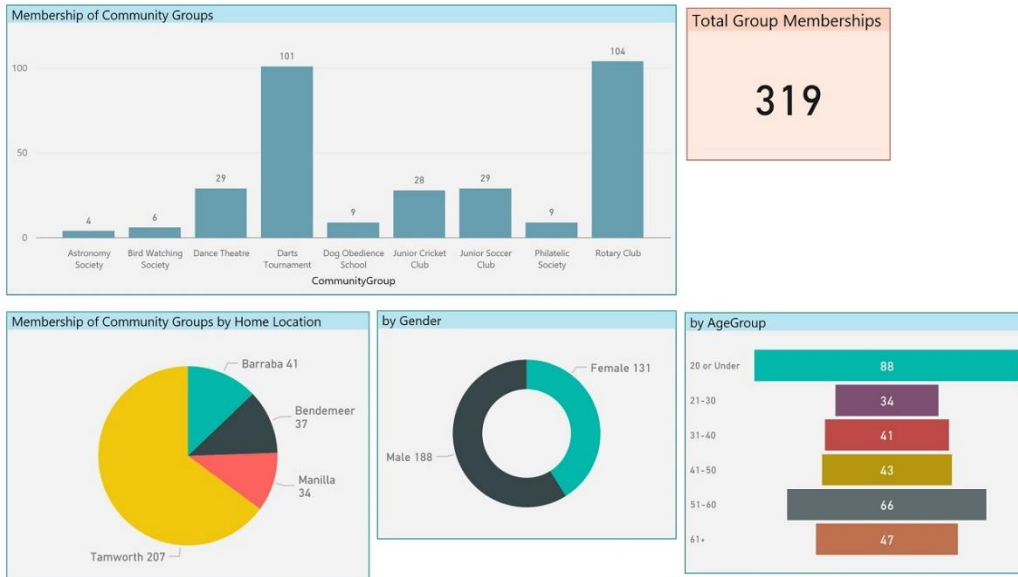
Integration with other Cloud Services

Foxtrot currently supports the following (optional) integrations and interfaces, and more are currently under development:

- Mailchimp
- PayPal
- Securepay
- IntelliSMS
- MYOB
- Xero
- Facebook
- LinkedIn
- Twitter
- Google+ *(coming soon)*
- BPay
- Telstra Postpay
- Direct Debiting / Automated Periodic Payments
- Oracle Financials interface
- WhereIs
- Google Maps
- Survey Monkey *(coming soon)*
- Leading e-Shopping platforms *(coming soon)*
- Interfaces to other popular online services are also under development or consideration

Foxtrot Research and Development

Stepsoft conducts an ongoing, comprehensive research and development program for Foxtrot and its associated Modules. Foxtrot Web is continuously reviewed, evaluated and enhanced with new features, modules or systems to improve functionality and useability of the application.

There are many exciting and usefool projects currently underway and soon to be released into the Foxtrot application. Some of these include:

- Foxtrot NDIS – a custom-purpose version of Foxtrot for NDIS Service Providers - *now available, ongoing expansion*
- Appointments and Scheduling for NDIS Service Providers– sophisitcatd, easy to use appointments setting and schedules management – *now available*
- Budget Management for NDIS Service Providers – manage budgets for each Particpant, set automated alerts and much more – *now available, ongoing expansion*
- Foxtrot OZone – sophisitcatd online services for Members - *now available, ongoing expansion*
- OZone Module expansion – significant enhancements including, blogs, discussion forums, e-shop, integration with Social Networking sites and much more,
- System wide user interface and useability improvements – *now available, ongoing and constant development*
- Events Management module – *now available, undergoing expansion*
- MYOB Accounting System Interface – *now available*
- Xero Cloud Accounting System integration – *now available*
- Visual Groups (enhanced groups ease-of-use functionality) – *now available*
- Further Enhancements to Group Email, SMS and e-Newsletter features – *now available*
- Rostering and Timesheets for volunteer management – *now available*
- Enhancements to existing Workflows features – *now available, as Membership Actions*
- Vastly enhanced Contact Management and CRM features – *now available , under continuous development*
- Paypal interface – *now available*
- Mailchimp integration – *now available*
- Facebook, LinkedIn, Twitter and Google+ integration with Foxtrot Sharing – *now available*
- SurveyMonkey integration – *coming soon*
- Web Services API for integration with 3rd party systems
- State of the art, easy to use User Interface – *under continuous review and development*
- Integration with Microsoft Power BI for advanced data analytics and reports – *now available*
- Foxtrot Mobile Apps – *under development*
- Much more as per Stepsoft's annual R&D plan – *under continuous review, driven by user and client needs, and industry directions.*

Contact

For more information about **Foxtrot** or **Stepsoft** please contact the Managing Director, Victor Zappia by email to md@stepsoft.com.au, or phone the office on +61 2 6233 0900, or email to enquiries@stepsoft.com.au, or visit our web site at: www.stepsoft.com.au