



Paritor Xperios Functionality

for Community, Premium, and Enterprise

Xperios comes in three versions with varying functionality and allowances. The table on the next page compares the features available under the Community and Premium versions of the software compared with the full functionality of the Enterprise version.

Whilst Community and Premium users have access to the same select features detailed in this document, the Community user will only be eligible to limited data usage, whilst a Premium user has full data usage.

	Community	Premium	Enterprise
Data Usage	Limited	Full	Full
Functionality	Limited	Limited	Full

On the next page, you'll find an extensive list of everything Xperios can do. For further information we recommend you contact us and seek a consultation.

Contacts		
	Store your contact data such as pupils, parents, teachers, schools, and centres in line with data protection regulations.	Available in all versions. Community limited to 50 pupils.
	Automated GDPR tool manages data in compliance with data regulations.	Available in all versions
	Associate your contacts with any number of organisations, such as schools.	Available in all versions
	Define different categories for your schools, to use when creating school records.	Available in all versions
	Define the types of school stored within your contacts.	Available in all versions
	Assign contacts multiple roles: debtor, pupil, teacher, user, and repairer.	Available in all versions
	Set up business types for allocating to your school or centre contacts.	Available in all versions
	Quickly search and filter contacts using the search bar and filter tool.	Available in all versions
	Quickly search and filter contacts using the search bar and filter tool.	Available in all versions
	On locating a contact you can access their details, including roles, personal information, pupil details, consent details, and debtor and booker details, and changed or finished event details.	Available in all versions
	On locating a contact you can access their evidence of expertise/ skill level.	Available in all versions
	On locating a contact you can access their financials, including fee details, invoices, debtor details, related transactions, payment schedule, and card transactions.	Available in all versions
	On locating a pupil you can access their pupil details, event changes, debtor and booker information.	Available in all versions
	Allow contacts to manage their data such as contact details, medical information, and school records, by logging in online.	Available in all versions
	Option to select multiple contacts on a list to contact in bulk.	Available in all versions
	Option to extract contact data for use in Excel or other software.	Available in all versions
	One click withdrawal of contacts from their assigned tuition.	Available in all versions
	Define your local authorities, to use when setting up contacts.	Enterprise only
	Define the wards or segments within your local authorities.	Enterprise only
Communications		
	Write emails using Xperios and the Live portal.	Available in all versions

	Email in mass by selecting multiple contacts at once.	Available in all versions
	Send text messages to multiple contacts at once.	Available in all versions
	Attach documents and files to emails, such as word documents, pdf's, images and videos.	Available in all versions
	Design and construct email templates for general or later use.	Available in all versions
	Use standard email templates to generate new emails from.	Available in all versions
	Automate update emails and emails that request an action from the customer.	Available in all versions
	Write manual emails for more unique topics, to send to individual contacts, or a group of contacts.	Available in all versions
	Create marketing lists to direct and channel your communications to the correct audiences.	Available in all versions
	Create customer personas to determine audience groups for tailored marketing content.	Available in all versions
	Create campaigns for marketing and improved communications across other platforms.	Available in all versions
	Manage emails for studies, events, auditions, exam sessions, groups, resources, and more.	Available in all versions
	Track communications with customers using an automatic communications log.	Available in all versions
	Use an AI powered assistant to provide a faster service for your customers.	Available in all versions
	Create a list of issue areas to document problems and tackle them.	Available in all versions
	Define the severity of an issue to gauge the urgency of the issue.	Available in all versions
	Create issue classifications to gauge the type of issue and who might best resolve it, helping top further define your issue types.	Available in all versions
	Create issue teams by selecting who deals with different issues to best target issues with the correct expertise.	Available in all versions
	Record the number of issue tickets raised with your customers to manage queries effectively.	Available in all versions
	Add resource items to a resource library to share amongst specific contact groups, such as training videos, learning material, etc.	Available in all versions
	Add and create QnA documents to assist your customers with their queries.	Available in all versions
Bookings		
	Create an activities catalogue of the services you offer such as tuition, events, auditions etc, so that customers can easily browse through what's available.	Available in all versions

	Contacts can book onto activities via the Xperios Live Portal.	Available in all versions
	Create activity categories for organising the types of activities your service offers, such as buy when they take place.	Available in all versions
	Define the appropriate audience for your activities by creating activity levels, that are defined by the audiences age, or skill level.	Available in all versions
	Further categorise the types of activities you offer by producing activity types.	Available in all versions
	Set up consent questions for online booking forms.	Available in all versions
	Create learning duration options to be used in online booking forms when ascertaining how long a pupil has been learning a subject for.	Available in all versions
	Create a list of disabilities for online booking form options, allowing you to help with personalised learning, and collect data.	Available in all versions
	Create a list of ethnic groups for your online booking options, allowing you to collect data.	Available in all versions
	Create a list of gender types for your online booking options, allowing you to collect data.	Available in all versions
	Create a list of interest sources for online booking options, allowing you to collect data about where customers are finding out about your organisation, and your courses.	Available in all versions
	Create customisable booking forms, tailored to gather the information your service requires of applicants.	Available in all versions
	Customise the look of your booking forms to suit your service brand and aesthetic.	Available in all versions
	Add your organisations logos to your booking portal.	Available in all versions
	Add text to your booking portal header and footer.	Available in all versions
	Add personalised privacy, medical, and GDPR text to your booking portal.	Available in all versions
	Generate your own form completion and checkout text.	Available in all versions
	Manage applicant waiting lists with an optional two-tiered system (where application approval is required from designated teaching staff).	Available in all versions
	Choose between a direct booking and a waiting application (waiting applicants can be approved at a later date).	Available in all versions
	Progress applicants from waiting lists for a service they have booked onto.	Available in all versions
	Contact applicants who have booked onto tuition to keep them informed of their application progress.	Available in all versions

	Offer secure payment processing for bookings via an accessible portal.	Available in all versions
	Offer parents and pupils a personal portal view of their booking information and status.	Available in all versions
	Connect your own payment provider.	Enterprise only
Teachers		
	Set up your different teacher faculties for use when creating teacher contact records.	Available in all versions
	Offer teachers a personal portal view to see and edit schedules, take attendance, make class notes, and more.	Available in all versions
	Define the types of teacher contract your organisation offers.	Enterprise only
	Create teacher pay scales to define how much a teacher is being paid.	Enterprise only
Tuition		
	Manage all waiting lists for tuition applicants from one simple layout.	Available in all versions
	Define the tuition services you offer, such as the age range you teach, and the education system you use.	Available in all versions
	Create records within the system of the subjects you offer to define the available teaching.	Available in all versions
	Create records for the different genres that you teach, such as jazz, classical etc for music.	Available in all versions
	Define the tuition information that you collect.	Available in all versions
	Set up your academic years so that the system can efficiently schedule your services.	Available in all versions
	Create leave reasons to log common reasons for pupils leaving.	Available in all versions
	Create activity groups for your activities, helping you group together your activities.	Available in all versions
	Set up the reasons that an activity might be cancelled, so that you can easily record why activities haven't taken place.	Available in all versions
	Create service types to define the settings for each of your services, such as events, exams etc.	Available in all versions
	Set up register keys for quickly determining attendance and decide if the lesson is charged.	Available in all versions
	Use the task results tool to determine whether a lesson was successfully delivered and covered all requirements, and whether the teacher should be paid.	Available in all versions
Studies		
	Set up pupil Studies within your system.	Enterprise only
	Create compulsory and optional study items (modules, lessons, etc.) within a study.	Enterprise only

	Create personal study offers for each applicant, that can be accepted rejected, or have changes requested.	Enterprise only
	Transfer pupils between different Studies.	Enterprise only
	Progress pupils onto the next study.	Enterprise only
	Send emails to multiple students within a study list.	Enterprise only
Exams		
	Detail your exams within the system and your online activities catalogue.	Available in all versions
	Define assessments and the necessary skills for each assessment, by creating progress levels.	Available in all versions
	Customise your online activity catalogue to appropriately illustrate the nature of the exam offered by your service.	Available in all versions
	Customise your exams booking forms to suit the information your service requires of exam attendees.	Available in all versions
	Customise questions throughout the booking process.	Available in all versions
	Include the exam boards that you use, and the grades they offer.	Available in all versions
	Link your exams to their appropriate exam boards.	Available in all versions
	Add additional questions relevant to the exam booking.	Available in all versions
	Request additional information from exam applicants.	Available in all versions
	Request a subject and grades from applicants to assess their suitability for the exam they are applying for.	Available in all versions
	Request available and unavailable time slots from applicants.	Available in all versions
	Use the applicant status such as awaiting approval, accepted, rejected etc to determine an applications progression.	Available in all versions
	View exam statistics to determine the success of pupils who underwent the exam	Available in all versions
	Bulk email exam candidates.	Available in all versions
Auditions		
	Detail your auditions within the system and your online activities catalogue.	Available in all versions
	Set up the time slots within which auditions take place.	Available in all versions
	Oversee available and advertised auditions in your activities catalogue.	Available in all versions
	Define the instruments or parts to be performed in an audition using your audition items.	Available in all versions
	Customise your audition booking forms to suit the information required for that booking.	Available in all versions

	Request evidence of skill level from audition applicants to ensure their suitability.	Available in all versions
	View applicants evidence of skill level.	Available in all versions
	Add successful applicants to groups or studies.	Available in all versions
	Transfer, withdraw, and bulk email applicants to update them on their application progress.	Available in all versions
Events		
	Detail your events within the system and your online activities catalogue.	Available in all versions
	Give customers the ability to book individually, as a group, or from a list of bookers.	Available in all versions
	Set up events that require teacher approval for each attendee.	Available in all versions
	Determine how regularly your events occur within the system.	Available in all versions
	Customise your event booking process.	Available in all versions
	Customise event application forms to suit the information your service will require.	Available in all versions
	Optional request of skill level evidence for specific events.	Available in all versions
	Define whether there are available event extras on offer to applicants, such as tickets to a performance or transport to the event etc.	Available in all versions
	Determine the maximum number of people able to attend each of your events.	Available in all versions
	Decide what happens when an event reaches maximum capacity, either add applicants to the waiting list, or close the booking.	Available in all versions
	Set the minimum number of people needed to make an event viable by deciding upon an event threshold.	Available in all versions
	Monitor event attendee lists and waiting lists.	Available in all versions
	Transfer multiple pupils between events.	Available in all versions
	Easily contact those who have booked onto an event.	Available in all versions
	View event statistics to determine the success of an event for future purposes.	Available in all versions
Groups		
	Set up groups within your system to easily manage choirs and orchestras etc.	Available in all versions
	Add one or several members to a group at once, from the waiting list, or transferred from an audition.	Available in all versions
	One click withdrawal of members from a group.	Available in all versions
	Select when applicants can join, i.e. as soon as they apply, or from the next academic term or half term..	Available in all versions
	Create group schedules and assign group activities.	Available in all versions
	Define fees and available discounts for group members.	Available in all versions

	Apply a group enrolment fee.	Available in all versions
	Log the hire or sale of resources to groups.	Available in all versions
	Reduce or increase invoices as well as cancel invoices for group members.	Available in all versions
	Communicate with group members or group sub-sections via email.	Available in all versions
	Record group alumni.	Available in all versions
Resources		
	Record what happens to a resource, such as it being hired, in repair etc.	Available in all versions
	Create resource categories to categorise the resources on offer.	Available in all versions
	Create resource groups within your resource categories.	Available in all versions
	Create resource locations to track the location of your resources.	Available in all versions
	Record the history of resource hire for each item.	Available in all versions
	Record a history of resource repairs for each item.	Available in all versions
	Add resource barcodes to track and manage your resources more easily.	Available in all versions
	Manage resource waiting lists for popular resources.	Available in all versions
	Produce hire agreements to share with those who hire resources from you.	Available in all versions
	Set-up automatic invoices and reminders for payers to ensure hire payments come through.	Available in all versions
Finances		
	Set up the charges for different activities.	Available in all versions
	Set up and alter payment schedules through the system.	Available in all versions
	Pause payment schedules at the click of a button.	Available in all versions
	Send automated emails to customers in relation to their to payment schedules.	Available in all versions
	Set up automated refunds.	Available in all versions
	Set up automatic invoicing.	Available in all versions
	Create credits on invoices.	Available in all versions
	Post receipts to an invoice.	Available in all versions
	Add in your VAT codes.	Available in all versions
	Create remissions as a way of reducing invoices.	Available in all versions
	Create ledger codes for the financial tracking of departments within your organisation.	Available in all versions
	Create discount codes that can be used by booker or yourself on an invoice.	Available in all versions
	Decide how discounts and bursaries are applied to invoices.	Available in all versions
	Set up the bursaries that you offer as an organisation.	Available in all versions
	Set up and define any sibling discounts you offer.	Available in all versions

	Set up a limit for writing off invoices.	Available in all versions
	Authorise credits and set tasks for system users to complete authorisations.	Available in all versions
	Authorise refunds and set tasks for system users to complete authorisations.	Available in all versions
	Manage failed card payments by sending automated emails to the contacts in question.	Available in all versions
	Manage expired cards by sending automated emails to the contacts in question.	Available in all versions
	Manage all invoices using one simple layout.	Available in all versions
	Change the status of invoices if it is in dispute, or review.	Available in all versions
Reporting		
	Create a customisable dashboard to track your organisation's performance.	Available in all versions
	Edit your dashboard to show only key performance information.	Available in all versions
	Use the refresh button to see only the most up-to-date reports on your dashboard.	Available in all versions
	Use pre-defined filters called query cards to find popular data searches.	Available in all versions
	Set up your own query cards and easily fulfil your most popular data searches.	Available in all versions
	Filter and search for specific data using the filter and tags search bars.	Available in all versions
	Define your departments to produce reports on each departments performance.	Available in all versions
	Easily extract data and analyse in Excel.	Available in all versions
	Access personal API keys to create impressive and easily refreshable data visualisations outside of Xperios.	Available in all versions
Help		
	View all of Paritor's online training resources to refresh your knowledge on system functionality.	Available in all versions
	Upload your own resources to a digital library which can be shared amongst select contacts.	Available in all versions
	Use built-in virtual conferencing for distanced learning.	Available in all versions
	Use the built-in Paritor help and support to tackle issues and queries regarding Xperios.	Premium and Enterprise only
	Access to call support for direct assistance.	Enterprise only
Live Portal		
	View all activities in a diary view via the portal, available for teachers pupils, schools, and centres.	Available in all versions
	Live portal accounts for teachers, pupils, bookers for easy future bookings.	Available in all versions

	Offer a secure payment provider for all booking payments.	Available in all versions
	Allow debtors to alter their payment schedule via the portal, within set payment windows.	Available in all versions
Miscellaneous		
	Import any data you have before you start using the software.	Available in all versions
	Choose from multiple language options and set the culture of your system.	Available in all versions
	Set up user groups to provide different users with different system access levels	Enterprise only