



# An introduction to isimo

## ISIMO CAN SIMPLIFY YOUR LIFE. HERE'S HOW.

### • What Is Isimo?

**Isimo** is not a software program. It's a web application.

### • What Is a Web Application?

First, to access **isimo**, you will need an Internet connection. Open your Internet browser and enter [www.isimo.ca](http://www.isimo.ca). When you arrive on the site, type in your password. You will then find yourself in a secure area where you can immediately access all your member lists, courses, workshops, activities as well as all your reports.

There is no need to buy equipment or software nor do you have to download or install anything. If you have access to the Internet, you have a direct line to **isimo**.

### • What Are the Benefits of a Web Application?

- Once your application for activation is uploaded, you will be able to start working with **isimo** within a few hours.
- Given that data is accessible via the Internet, you can review it at any time, from anywhere.
- You can give access to the site to an unlimited number of users working simultaneously in different locations without requiring a costly network.
- Your data is backed up on highly secure servers and managed by qualified professionals. You no longer have to live in fear of a computer system failure or accidental loss of data.
- All system updates and improvements are available free of charge and are installed automatically.

### • Catalogues

Thanks to the catalogue's editing function, you can group your activities by session, level, physical location, or however you currently do it. **Isimo** enables you to quickly create activities, make copies that you can then modify, and display them in the order that suits you.

### • Online Registration

With **isimo**, online registration becomes child's play.

We place an "Online Registration" button on your website that directs your clients to an **isimo** personalized page displaying your logo. They immediately know that they are at the right place and that they can register without difficulty. You do not have a website? No problem! We will provide you with a link to **isimo** and you just have to give your clients the link's URL address.

Using a simple step-by-step procedure, your clients can enter both their personal information and that of their family members. Moreover, they can update their file through their personal account without having to contact you directly.

If some fields are left blank or incorrectly filled out, **isimo** notifies them immediately. As a result, your client files are always complete. When they finish registering, they receive a confirmation by email. Both you and your clients always know how many places remain available for each activity or if an activity is full.

Your clients can also choose to pay online or send you their payment. You decide which methods of payment that you will accept. **Isimo** can supply you with a merchant account if needed.

**Isimo** is intended for businesses, organizations and municipalities that offer activities and that need to manage the registration process as well as the members participating in the activities.

Because of its ability to gather client information more accurately and to manage financial transactions flawlessly, **isimo** enables you to function in a simpler, quicker and less costly manner.

"**Isimo** is so effective and registration through the Internet so popular that we no longer have to extend our office hours during registration periods."

Josée Roy, Accountant  
Tennis Montreal





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## • Reports and Statistics

**Isimo** offers numerous tools for generating documents, reports and statistics, including attendance sheets, client lists, transaction reports, invoices, membership cards, labels, income tax slips, etc.

You probably use software such as Microsoft Word and Excel as well as accounting programs. With **isimo**, you can easily import your files in Word (text), Excel, PDF or XML formats and then use your other software to process your data.



Also, to help you in your day-to-day operations, **isimo** features a page or «control panel» for compiling useful statistics and generating charts, which allow you to get an instant snapshot of how things are going.

## • Financial Management

**Isimo** is not an accounting system. However, it enables you to carry out a large number of financial transactions.

You can enter payments made in cash, by cheque or by credit card. You can give refunds or issue invoices, receipts and statements of account on a per unit basis or to all your clients at the same time. You can easily apply discounts or charge additional fees.

Each client has access to his account and can find out if his payment has been processed. The amount paid and the balance owed by each client is instantly updated. Moreover, you know which employee processed the transaction.

## • Communications

**Isimo** is a full-fledged system for managing your members. It offers a number of useful communication tools so that you can stay in touch with them and keep them fully informed. Each transaction made by you or your client is automatically followed up with a personalized confirmation sent by email to your client.

The activities coordinator or group leader can send a message directly to his members. You can also send them a mass mailing and even insert documents in the mailing. This function is an excellent complement to your address book.

## • Security

Your data belongs to you and is kept confidential and secure. We host it in order to make life easier for you. All information transmitted through the web is 128-bit SSL encrypted, verified by *thawte* and certified by TrustKeeper. Financial transactions are handled by Moneris Solutions, a joint investment between RBC Royal Bank and BMO Bank of Montreal. Backups are made daily and the database servers are highly protected against any security threats.

## • Service

Our team is here to help you! We provide technical support by email and telephone at no extra cost. We also offer optional, on-demand training as well as online assistance and documentation. Your clients will be able to use **isimo** intuitively on the first try without prior training. We can help you guide them if need be.

If you have particular needs or if you are in a situation that **isimo** does not presently address, we can personalize the system upon request.

**Email:** [info@isimo.ca](mailto:info@isimo.ca)

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**Fax:** 514-343-0004

**Mailing address:** **isimo**

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*“Isimo is versatile, which is great for an organization like ours. We use the same tool for our swimming courses as well as for our ACQ-certified day camp. We can easily print out income tax receipts and RL-24 slips. Isimo makes our life so much simpler and managing registrations has now become a pleasant experience!”*

Geneviève Monast  
*Camps thématiques Hippocampe*