

Feature Highlights

System

Web-based, hosted platform utilizing latest .Net, HTML, java, bootstrap frameworks and more

Mobile responsive site design, including style sheets individually designed for desktops, tablets and phones

Fully integrated AMS and CMS system utilizing the DNN Evoq Professional platform

Robust MS SQL 2016 Databases with full nightly backups and 15 minute transactional backups

Secure, high performance hosting center

CRM

Full 360-degree view of each contact

Distinct records for organizations and individuals, to allow for unlimited affiliations

Three levels of organizational hierarchy to support top level entity with unlimited second level and third level organizations. Individuals can be affiliated with any number of the organizations at any level. Benefits and voting rights can flow up or down the chain.

Unlimited addresses, communication records, demographics, opt in/outs and prospecting tags

Notepad and tasks for managing basic workflows and touchpoints

Upload photos, logos and biographies

Membership

Individual and corporate owned memberships to support professional and trade membership models

Chapters, Regions, Networks, Divisions, Special Interest Groups, Academies, Local Associations and all other groups are supported. Can be auto assigned based on location or demographics.

Dues can be calculated based on any data or rule, and can differ based on any membership type

Additional fees can be bundled, to then be hidden or displayed, to allow for separate GL accounts and financial analysis

Members can be advanced automatically such as from Student to Post Grad to Professional

Separate processes and reports for members joining, renewing and returning after a gap

Recurring payments for automated dues renewal

Robust deferral revenue tracking

Online processes for joining and renewing built to your specifications – no templates you must “fit” into

Online searchable member directories, with dynamic results presentations and mapping

Online membership letters, cards and certificates for the member to download directly

Prospect member tracking, with unlimited categories. Combine with the Notepad tasks to create workflows.

Supporting document uploads for membership approval

Approval and workflow staging, with separate membership application review module

Governance

- Unlimited committees and positions
- Historical and current terms and positions maintained
- Online display modules with configuration options for personal information to be hidden or displayed
- Website roles for restricted pages and content
- Chapter, region, group and association officers can run their own reports and exports via the website
- Elections and Calls to Serve or Calls for Volunteers

Meetings and Events

- Full conference setups with pre-conference, workshops, sessions, courses, tours, meals and more
- Early, Regular, Late and Onsite pricing
- Member based pricing, tied to each member type
- Bundled fees to include membership and other fees with conference registration
- Automated group registration fees and discounts for groups, exhibitors, sponsors, speakers, governance and more
- Online registration, including updating profile, demographics, opt/in outs, donations, store purchases and more
- Online attendee directory
- Searchable meeting sessions, with presenters, photos, bios and material downloads
- Facility and room setup tracking, with meeting specific questions and special needs
- Education courses with credit types and units
- Transcripts and certificates, downloaded online directly by attendee if desired
- Badges, with logos, QR codes, bar codes and tickets
- Attendee lists, sign-in sheets, registration income reports
- Reports to compare multiple meetings in a single report
- Micro-sites for meetings, with their own skins, design and graphics
- Kiosk for check-in, with badge and ticket printing
- On-site walkup registration processing

Stand-Alone Events

- Online calendars and dashboards for listing courses, webinars, meetings and events
- Online registration, with group registration and discounts
- Education courses with credit types and units
- Badges, tickets and guests
- Transcripts and certificates, downloaded online directly by attendee if desired
- Invited and RSVP-only events
- Early, regular, late and onsite pricing, based on member type and non-member

Presenter Center

Used for Calls for Papers, Proposals and Presentations

Online submission form you create, with all data entry formats

Tracks, presentation methods, co-authors and co-presenters

Allows for downloading and uploading documents

Online review form you create, with all data entry forms

Allows assigning reviewers by committee and contact lookup

Online disclosure and conflict of interest forms along with speaker bios and photos

Email notifications to submitters and reviewers

Final approval to manage those accepted, rejected or other status

Meeting planner to schedule sessions into rooms, dates and times

Room capacities, education credits and types assigned at the same time

Conflict checks for presenters and presentations that are double-booked

Online searchable meeting directory

Shows and Exhibits

Trade show floor designer for booths and tables

Online live booth selection, with optional timed entry and priority point based entry

Online request mode where top choices are listed but staff make the final booth assignments

Online profile guide info, sales contact info, advertising and sponsorship purchases

Online ad and logo material uploads

Online service center for personnel registration, updating all show materials, ticket and meal purchases

Online directories of the show floor, exhibitor profiles with logos and sales info, optional product and service categories, links to their website

Online logo display and sales info for sponsors, by category

Separate badges, rosters and registration pricing

Certification and Continuing Education

Full certification, certificate courses and continuing education

Optional online processing for application, exam registration and fees

Approval and email notification management

Courses, materials purchases, exam score and course result management

Re-certification, pass-fail procedures

Online Certificates, letters, transcripts and credentialing

Continuing education courses and tests, with credit types, units, certificates and transcripts

Exports and optional API for reporting credits out and importing credits and courses in from LMS

Fundraising

- Separate accounting companies for Foundations and PAC's
- Unlimited donor fund opportunities for giving
- Optional recurring payments auto-charged by credit card
- Tracking of In Memory Of/In Honor Of, along with how the donor wishes to be recognized
- Automated confirmation emails with optional print and mailed letters
- Giving level tracking which can confer benefits and special pricing
- Pledges with reminder tracking
- Scholarship, Grants and Awards management

e-Commerce

- Advanced shopping cart for unlimited transactions and recipients in a single check-out
- Unlimited accounting companies and merchant accounts
- Credit card, debit card, electronic check, ACH transfer and recurring payments
- Invoice only option with no payment required, with PO numbers
- Fully PCI compliant and secure through Authorize.Net
- Real-time credit card processing
- Promotion codes, discounts and appeal codes

Accounting

- Interfaces and exports to all major accounting systems
- Robust deferral revenue management
- All transactions processed into batches, with journals and batch posting routines
- Voids, refunds, exchanges and adding money to balance forward account for future purchases
- Automatic credit card refunds and check refund management
- Unlimited charts of accounts and accounting companies
- Detailed sales and A/R reporting

Online Store

- All merchandise and downloadable files
- Unlimited categories and tags such as "Publications", "New", "Clearance"
- Shipping and Handling fees designated for each item, by quantity, dollar amount or total weight purchased
- Discounts and promotion codes
- Bundled products, which maintains each separate item and GL account in the bundle
- Templates for displaying products with thumbnail and full size images
- Member and non-member pricing
- Fulfillment reports and management
- Full inventory management with re-order point alerts
- Sales tax by state and country

Document Repository

Electronic librarian for reference materials, manuscripts, videos, documents and images

Secure file system outside of website and invisible to all search engines

Fully indexed and searchable documents

HIPPA certified document storage for confidential record keeping

Integrated with online store for purchases

Create your own submission and review processes for awards, scholarships and grants

Create your own forms for Calls to Serve, Volunteer, Mentor and to be a Mentee

Reporting

Hundreds of pre-built standard reports and exports

Generated as .pdf, MS Excel and CSV outputs

Advanced query module for custom queries and exports

No database or programming knowledge required

Automated Email Communications

Shopping cart confirmations, invoice reprints, renewal notices and statements of invoices owed

Member and conference badges, letters, certificates, transcripts and itineraries

Education certificates, letters and transcripts

Presenter, speaker, exhibitor, sponsor and advertising confirmations

Confirmation emails connected to items purchased for special messaging for every item on an invoice

Bulk emailing to any group, with unlimited, free emailing

Build, name and save your queries for repeated use

Advanced click tracking to capture all purchases made on website as a result of an email

Open and bounce-back tracking, with unsubscribes managed via the list of opt in/outs you create

New in late 2017 – API integrations to Informz and Real Magnet

Website Modules

Single sign-on with password reset and username maintenance

Dozens of modules for image rotators, photo galleries, blogs, forums, news articles, calendars and more

Advance API integration available, with standard integrations to Higher Logic, all major accounting packages and many event, trade show and LMS systems

Full CMS management system, with unlimited micro-sites

Create restricted pages and communities for any committee, member, chapter, region, sponsor, donor, exhibitor, attendee group and more