



CRM FOR MEMBERSHIP ORGANISATIONS

The perfect solution for your membership organisation or association. Manage your members, keep your members up to date through our communicator. Take the pain out of collecting membership.

Clients / Members

- Client profiling
- Customise client dropdown fields
- Client fields you can customise
- Unlimited Clients in your database
- Client Texting
- Client Emailing

Appointments

- Schedule future appointments
- Record past appointments
- Schedule appointments for your colleagues
- Reminder to Members about appointments
- Reminder to staff about appointments
- Recurring appointment scheduling
- Appointment & Activity tracking
- Activity reporting
- Outstanding activities on dashboard
- Integrated Diary
- Bulk assigning of appointments

Reporting

- Client / Member Report generator
- Analytics reporting
- Staff Activity reporting
- Report on Tasks and Activities
- Analyse by member and appointment type
- Communication reporting
- Report output to Excel
- Report output to PDF
- Download all reports to excel

User Functionality

- Restrict staff to see certain members
- Restrict staff to see their own diary only
- Role permissions
- Task & Activity tracking

Communication

- SMS facility available
- Email individual client
- Bulk email clients
- Text individual client
- Bulk text clients

- Schedule automatic reminder to members for appointments
- Communication reporting
- Email integration - automatic link with Outlook
- Full history of communication with clients

Document Storage

- Upload templates and policies
- Upload documents for members
- Upload links to dropbox & YouTube etc.

Administration

- Full audit trail helping with compliance
- Access archived content
- Manage your users
- Assign role permissions
- Import members

User Permissions

- Permission to merge members
- Permission to view Reporting
- Permission to view own and colleagues diaries
- Permission to bulk edit members
- Permission to view own members

Support

- On screen Support
- Email Support
- Phone Support
- Access to instructional videos

Membership Renewal

- Bulk generation of invoices for different classes of membership
- General individual invoice if required
- Bulk emailing of invoices to members in PDFs
- Record membership payment against invoice
- See outstanding Membership
- Full history of membership for your members

Data Management

Merge Member facility
Bulk data updater
Pre import cleansing of your membership
Initial transfer of your existing data
Data Management work
Fixed Client import facility

Integration

Integration with Microsoft Excel
Output to PDF
Integration with Outlook
Integration with Mailchimp
Output to Hotsoft (Hotel software)
Links to Google Maps to find clients
Plot your members on Google Maps

Navigation

Quick search from every screen
User dashboard
Tailored for PC, Laptop, Tablet and Smartphone

Invoicing & Payments

Add in Invoices for clients
Bulk assign invoices for courses for example
Automatic weekly or monthly set amount invoicing
Record Payments for clients
Customise Payment types and methods
Invoice & Payment reporting

Online Payments

Integration with Stripe
Take online payments from your clients
Let your clients pay their bills online

Course Management

Manage your tutors
Customise Course categories and Course Types
Max Learners facility
Bulk Assign learners to courses
Bulk Assign invoices to learners
Produce Class schedule and class list for tutor Bulk
text and email a class
Learning history for each learner


Confidential Activities

Administrator can flag certain Activities as confidential and restrict access to these
Regular users do not see confidential activities

Training

Set up training
User Training
Administrator training
Online one to one training
Webinar training
Classroom training
Train the trainer

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