



Web Portal for Members

Drive member satisfaction with a 24/7, one stop-shop. Members can quickly process and update applications, renewals, subscriptions, and profiles; register for events, meetings, and continuing education; purchase products; submit job postings and advertisements—that's just the start.

Increase competitive value and drive revenues. Showcase all the benefits you offer members, suggest cross-sells and up-sells right on your site—and then go a step further. With Web Portal, members can take advantage of your services and products at their own convenience, equipped with accurate, real-time information.

Help members connect with each other. Members can quickly search for groups and people with similar interests; post and view jobs, trainings, and activities; and manage chapters, sections, and committees.

Help staff work faster and smarter. Information and transactions flow seamlessly between Web Portal and the CRM for Members database, eliminating data re-entry and simplifying the full range of membership management.

Get started fast and maximize your existing investment. Web Portal works as a natural extension of your CRM for Members solution—including your financials. There's no need to change your website or spend time and money on customization efforts.

Connect members with your association—and with each other—through a portal that works seamlessly with your total association management solution (AMS). Protech Web Portal for Members securely links membership information and activities from your CRM for Members database, providing comprehensive self-service for members and simplified management for your staff. The result? An association built on the keys to growth: active member participation, enhanced service and communication, and superior organizational efficiencies.

Eliminate redundant data entry and increase the accuracy of your member records by empowering members to view and update profile information online. Updated data flows directly into your CRM for Members database.

Increase the visibility and effectiveness of your fundraising campaigns by placing contribution links anywhere throughout your existing website.

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| <p>MEMBERSHIP</p> <p>Combine convenience, organizational efficiency, and security with self-service that connects automatically with the CRM for Members database. Automated confirmation notices save time and ensure members know you're current with their needs and actions. Robust security controls and single-sign on ensure data is protected, while giving people fast access to the information and processes they need.</p> | <ul style="list-style-type: none"> ● Individuals can apply for memberships directly through your website. ● Self-service options include online dues payment and automated renewals processing. ● Members can update profiles, communication preferences, and other critical information. ● Chapter members have quick access to information relevant to their chapter and section. Members with appropriate access privileges can view and manage chapter information and leadership. ● Committee members with appropriate access privileges can manage committee information, leadership, funds, and reporting. ● Professional development options deliver online views of course and certification offerings, including search by specific category. Members can determine their eligibility; schedule courses; and track credits, scores, and progress. |
| <p>FUNDRAISING</p> <p>Transform fundraising into a 24/7 opportunity for members to pledge and contribute to campaigns—without adding staff overhead and effort.</p> | <ul style="list-style-type: none"> ● Members can select from multiple contribution campaigns and either pledge or make direct contributions—all from your website. ● Enhance contributions by giving member the ability to add donations to any transaction, such as dues renewal. ● Donation tax receipts can be generated automatically, saving time and ensuring clear records. |
| <p>TRANSACTIONS</p> <p>Straightforward financial integration ensures that all online transactions automatically update within the CRM for Members database. Multi-company and multi-currency capabilities extend the reach of e-commerce and help ensure fast, error-free transactions.</p> | <ul style="list-style-type: none"> ● Direct integration with CRM for Members enables system-wide processing for dues, subscriptions, advertising, fundraising pledges, and product orders. ● For every online transaction, an invoice is generated in appropriate member records in the back office, eliminating double data entry and redundancy. ● Transactions flow through the system to general ledger for automated batch processing. ● Credit card processing capabilities meet PCI compliance standards and link directly with merchants for easy reconciliation. ● Members can view all their transactions and past notices from within Web Portal, eliminating the need to call the association and reducing manual work for staff. |
| <p>PUBLISHING</p> <p>Drive revenues and increase value to members with fast, effective options for purchasing subscriptions and classified advertising.</p> | <ul style="list-style-type: none"> ● Provide a complete view of your publications list. Members can purchase and renew subscriptions online, with pricing and availability tied to member-specific rules in your CRM for Members database. ● Members can purchase advertising for display on your website, and then select and create ads based on your criteria for length of time, type of advertisement, and pricing. |

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| <p>EVENTS Give members a single location that lets them take full advantage of all the activities your organization offers.</p> | <ul style="list-style-type: none"> ● Deliver fast access to real-time calendars and lists for meetings and events. ● Based on predefined questions, members can select the right meetings for the right people and groups. ● Members can register individuals and groups online. Eliminate bottlenecks with automated conflict checking and wait-listing. ● After initial registration, members can select or change sessions at their convenience. ● Online exhibit contract management—with integration to EXPOCAD—makes it easy to purchase and set up booths, request spaces based on real-time availability, and revise booth assignments, signage, and industry categories |
| <p>ONLINE STORE Equip members with a global shopping cart that makes it easy to select products and services and process orders.</p> | <ul style="list-style-type: none"> ● Members can purchase products, buy subscriptions, and more, using intuitive e-commerce capabilities. ● Shopping carts are tied to membership types in the CRM for Members database, ensuring that members see appropriate pricing. ● Download capabilities deliver products directly to members' desktops. ● Product sales and store catalogs connect with inventory management (including kits and back orders) to ensure accurate availability, prompt fulfillment, and efficient replenishment. |
| <p>DIRECTORIES/SEARCH Connect people and activities across your association with online search capabilities, directories, and professional development tools.</p> | <ul style="list-style-type: none"> ● The Find a Member directory offers flexible search options for locating individuals, groups, and chapters. ● Find a Committee Member search enables flexible searches for members based on their committee affiliation or their title. ● With Find a Professional, members can search for individuals with specific certifications ● Find a Job provides members with current postings for positions submitted by organizations, along with targeted search capabilities. ● Find an Exhibitor enables members to quickly locate exhibitors registered for upcoming tradeshow. |
| <p>DEPLOYMENT AND ADMINISTRATION Web Portal for Members works seamlessly with CRM for Members and can fit with your existing website.</p> | <ul style="list-style-type: none"> ● Web Portal snaps into your existing website, minimizing deployment time and costs. ● The Web Portal Business User role is managed within CRM for Members, eliminating the need to juggle systems. ● Business users with appropriate rights can modify and update Web Portal, without calling on IT staff. ● Depending on your needs, you can easily add advanced collaboration and networking capabilities with Microsoft SharePoint technologies ● Single sign-on authentication protects members, information, and your system, but simplifies member log-in across CRM for Members, Web Portal, and associated sites. ● Take advantage of the Web Portal Bridge to quickly pull information from the CRM for Members database and publish dynamic web content. |

