



Membes SaaS Feature List

January 2018

Disclaimer: This list intends cover many of the primary features of the Membes association platform. However, it is by no means an exhaustive list, as there may exist features in the Membes platform that has not been listed below. Features may have also been updated to extend functionality or modify from the behaviors listed below.

--- Commercial in confidence ---

membes | Feature List

membes Base

Membership Management

Ref.	Function
	Online Joining Form
	Online Joins submitted directly to Database
	Custom Fields in Joining and Renewal Forms (configurable by Membership Type)
	Configuration of which Membership Types can Join Online
	Auto Detection / Addition of GST by Country (configurable by Membership Type)
	Organisation / Individual Online Joining Form
	Add On Options. Single or multi selection. Default value configurability. (Additional Tiers, services, donations etc.) (configurable by Membership Type)
	Separate configurable additional Joining Fee
	Configure Manual or Automatic Approval (configurable by Membership Type)
	Automatic email to Applicant on Joining (configurable by Membership Type)
	Automatic email to Applicant on Approval (configurable by Membership Type)
	Configurable Membership Periods (configurable by Membership Type)
	Pricing configured per Membership Type
	Pre-Configure future pricing by Membership Type
	Auto Membership Status setting on Approval (configurable by Membership Type)
	Allow Monthly, Bi-Monthly, Quarterly, Semi-Annual Auto Payments (configurable by Membership Type)
	Auto Membership Lapse on Failure to Renewal
	Membership Lapse Grace Period (Configurable by Membership Type)
	Easy Access Reporting on Renewals by Status (Pending, Pending Payment, Complete)

membes | Feature List

Membership Structure

Ref.	Function
	Create any number of Membership Types
	Membership Types Individually Configurable
	Corporate or Individual Membership Types
	Configure Pricing by Membership Type
	Configure custom fields by membership Type
	Rolling (Anniversary) or Cyclical Renewals by Type
	Define cyclical periods
	Configurable Status (Active, Inactive etc..)
	Optional Add-Ons available on Join and Renewal (e.g. subscription, donation etc.)

Membership Joining

Ref.	Function
	Members Join Online
	Configure which Membership Types can Join
	GST configurable by Applicants Country by Membership Type
	Configure / Enable Custom Fields in Join Form by Membership Type
	Credit Card Payments integration
	Invoice Generated on Join
	Free Membership Configuration (e.g. Student)
	Joins can go into Pending Approval, or Automatic Approval
	Dashboard view of all Joins Pending Approval
	Configurable Joining Fee (by Membership Type)
	Configure Automated Payments (Monthly, Quarterly, Bi Annually)
	Optional Add-Ons configured by Membership Type for Join form
	Automatically update to defined membership status on join

membes | Feature List

Membership Renewal

Ref.	Function
	Members renew online
	GST configurable by Applicants Country by Membership Type
	Configure / Enable Custom Fields in Renewal Form by Membership Type
	Credit Card Payments integration
	Invoice Generated on or before Renewal
	Free Membership Configuration (e.g. Student)
	Configure Automated Payments (Monthly, Quarterly, Bi Annually)
	Optional Add-Ons configured by Membership Type for Renew Form
	Automatically update to defined membership status on renewal
	Automatically update to defined membership status on expiry
	Automatically remove access to member content areas or event discounts
	Define grace period for continued access to member content areas or event discounts

Customer Relationship Management (CRM)

Ref.	Function
	Manage all stakeholders in one Database (members, non membes, suppliers, sponsors etc.)
	Log Interactions (e.g. Contact Logs, Event Registrations, phone calls, meetings etc.) in filterable, chronologic list.
	Flag Action reminders against a Profile and Assign to another Administrator
	Members can update their own details
	Members can view own data such as Invoice, Event Registrations etc.
	Create any number of custom fields, of any type (field, file attachment, Boolean, select etc.)
	Broadcast Email based on comprehensive filtering and segmentation

membes | Feature List

Content Management System (CMS)

Ref.	Function
	Easy page creation and editing
	Easy add module functionality to pages (Discussion Forum, Groups Portals, eCommerce, etc.)
	Menu and sub-page menu creation with drag-and-drop sorting
	WYSIWYG content editor
	HTML content editor
	CSS editor
	Custom JavaScript, CSS and CDN library loader
	Login tracking and analytics
	Integration with Google Analytics for page behaviour tracking
	Configurable public, member and other profile directories
	Schedule news posts
	Set introduction and detail views for news items
	Set event images and/or file attachment
	Home page with teasers for latest news, events or forum posting
	Create banners, banners sets, and control impression cycles for sponsored adverts
	Public or private general forum
	Set private or member restricted pages
	Integrate to another website via API
	Integrate to another website via Embeddable CMS (turn any page or module into an embeddable widget).

membes | Feature List

Profile Management

Ref.	Function
	Manage and update profile fields
	Custom field creation
	Custom field access control for members
	Automatic address validation
	Manual admin password updating
	Admin user permission control
	Change log history
	Profile interaction history, filtering and reporting
	Follow-up action creation, admin assignment and due date
	Profile statistics – including last login, recent events, forum posting and involvement
	Manual override of membership type, status, join and paid through dates
	Membership interactions recorded against profile interaction history

Profile Relationships

Ref.	Function
	Configure any number of Relationships (e.g. Employer, School etc.)
	Define Parent and Child of relationships (e.g. Employer / Employee, School/Teacher etc.)
	Export all profiles by relationship for custom reporting
	Options Configuration to allow Parent of Relationship can view details (event registrations, CPD etc.) of Children of relationship
	Optional Configuration to allow Parent to remove children
	Options Configuration to allow parent to invite children

membes | Feature List

Directories

Ref.	Function
	Create any number of directories
	Setup Public or Private (member only) Directories
	Directories searchable by area (e.g. results within X km or location)
	Results shown in list (closest at top) and pins on map
	Directory Listings viewable and printable via PDF
	Configure which fields are displayed in Directory Summary and full page
	Configure Custom filters

Financial / eCommerce

Ref.	Function
	Automatic invoice PDF generation
	Member invoice user-access via profile page
	Invoice pending / paid status
	Ad hoc invoice and payments
	Outstanding invoice filtering
	Invoice and transaction exporting
	Invoice and transaction filtering
	GST configuration for membership and events
	GST configuration for local or international countries
	Seamless payment gateway integration (take payment details on-site)

membes | Feature List

Communications

Ref.	Function
	Email segmenting – on membership type, location, status, group, newsletter subscription, or custom profile field
	Segment on event registration or attendance – include or exclude on a combination of event history
	SMS sending
	Custom web-form creation, submission exporting
	Communication interaction tracking against profiles
	Automatic membership reminders
	Automatic email on membership application
	Automatic email on event registration
	Automatic email alert to admin on custom form submission

membes | Feature List

Event Management

Ref.	Function
	Online registration
	Recorded against profile interaction history for tracking, filtering, statistics, reporting and communications
	Registration and attendance tracking
	Definable pricing tiers for stakeholder groups – automatically mapped on membership type and membership status. (E.g. non-member, member, student member, corporate member, sponsor, exhibitor, etc.)
	Individual or group registration. Group registration allows multiple profiles to registration and process a single payment and invoice.
	Attach event document and/or create more information page.
	Control registration – open/closed, maximum overall attendance, GST, and request dietary requirements
	Use internal registration, or specific external registration software/website per event.
	Restrict to member only events or open to public registration
	Create private events with Groups Portal module
	Email event registration certificates
	Process payments online via linked payment gateway, or payments paid/unpaid for offline transactions

membes | Feature List

Reporting

Ref.	Function
	Membership dashboard – including recent joins, type and location comparisons, renewal competition
	Engagement dashboard – including event registrations, forum posting, and member login
	Profile reporting – filtering by type, status, location, chapter, stakeholder group, event registration/attendance (include or exclude), profile number, join date, paid through date, and select custom fields (select and checkbox type)
	Profile export to Excel or PDF
	Profile heat map
	Profile relationship list exporting
	Profile interaction list exporting – including outstanding action filtering
	Revenue Reporting – Revenue over time, last 3 months, last 6 months, or last 12 months
	Revenue Reporting – Membership type, location or source stream (membership, events, or other purchases)
	Interactions reporting – based on admin/custom or system generated interaction types, completed / not completed, and over time period. Export to Excel. (typical examples - can be used to report against profile notes, profile tasks, board approvals, communications sent, membership, and more).
	Profile Relationship reporting – report on defined relationship between profiles. Export to Excel. (Typical example – list ‘staff’ of organisations, or ‘CFO’, or ‘board members’ etc.)
	Individual event report – total registrations, pending registrations, event revenue and export for profile details, event sessions, attendance

membes | Feature List

General Administration

Ref.	Function
	Setup any number of Administrators
	Restrict Admin functionality by Administrator (e.g. Finance, membership management etc.)
	Access all interfaces on Desktop, tablet, mobile and touch devices

3rd Party Integrations

Ref.	Function
	Google Analytics for page statistics and behaviour tracking
	Mailchimp for sending and creating email content – sync lists with profile filters from Membes
	API and web-hooks for other third-party integrations

membes | Feature List

Optional Modules

CPD Tracking and Auditing

Ref.	Function
	Member accessible CPD log
	Member submission of CPD activities – including upload supporting information, and/or answer defined CPD review questions
	Member downloadable (PDF) history
	Define CPD cycles
	Define CPD cycle streams (for overlapping or changing of defined cycles)
	Define internal and external CPD activities
	Batch (randomly) flag profiles for auditing
	Sort profiles/activities by cycle, flagged, unprocessed, approved, or unsuccessful
	Manually override and update profile CPD information
	Review submitted CPD supporting information/attachments
	Request further supporting information to user via automated forms
	Export CPD to Excel
	Define CPD activity submission process (mark as pending or lodge activity)

Conference Management

Ref.	Function
	Definable event sections – for various event components, days, or packages with start and end time/date, max attendance, and CPD points
	Event add-ons (for example, social events) for definable time/date, price and additional information required (e.g. additional guest names, food requirements etc.)
	Definable workshops and streams (e.g. for concurrent sessions) – with time/date, CPD points, and max attendance
	Link events to CPD activities, and define CPD points per event section or workshop session. Automatically push all CPD information to profile CPD logs by select individual, registration, or attendance.

membes | Feature List

Microsites

Ref.	Function
	Create a Microsite (e.g. for a conference or promotion)
	Manage pages via same CMS as main website
	Easily add pages and content to the Microsite
	All membes modules and CMS features available in Microsites

Surveys

Ref.	Function
	Build unlimited number surveys
	Define survey questions – by description, type, if required
	View individual submissions (record against profile history)
	View survey reports
	Export survey reports to PDF
	Define publish and expiry survey dates
	Embed survey in public, member or unlisted CMS page(s)

Online Store

Ref.	Function
	Sell products through website
	Take online payments via integrated credit card gateway
	Set non-member and member product prices
	Set discount for volume purchasing
	Attach product image
	Set web-hook for third-party integration

membes | Feature List

Employment Module

Ref.	Function
	Create structure job position listings
	Uploaded job file attachment or image/logo
	Allow users to post job listings (and restrict to member submission only)
	Pending/approval process

Groups (SIG) Portal

Ref.	Function
	Create any number of SIG Groups Portals
	Each Portal contains private Discussion Forum.
	Discussion Forum generates email notification to Group Members when topic or reply posted
	Each portal contains private Events Calendar with full event and registration capabilities
	Each portal contains private File Repository
	High Security so only those with permission can access group
	Easily add and remove people to / from groups

Embeddable CMS

Ref.	Function
	Easily turn any section of the CMS, Module or capability into an embeddable widget
	All data view from and entered into Embeddable widget working of single membes Database
	Consistent styling of widget
	Any section or capability (discussion forum, event registration, directory, joining anything..) of the system can be seamlessly embedded into any website
	Embed using standard HTML iFrames

membes | Feature List

Mobile App

Ref.	Function
	Styled to your Association
	Integrates direct into membes Database
	Membes can login and access member specific data
	Member update details
	Events Calendar
	Discussion Forum
	News and Events
	Push Notifications

API (Application Programing Interface)

Ref.	Function
	Full function API
	Allows single Sign between membes and an custom software or platform
	View and Update profile data
	Access events
	Access Discussion Forums
	Access Group Portals
	Full API Docs available here: http://apidocs.membes.com.au/