

Features on Which to Evaluate Database Solutions

Services & Benefits

- Ability to Enroll and Bill a Limited-Benefits Membership
- Ability to Bill and Track Benefits Associated with Membership Tiers
- Ability to Retain the History of Benefits-usage and service history

Events

- Event Attendance Management – Including Multiple Ticket Purchases
- Event Sponsorship with History
- Online Event Registration and Payments
- Text Search for Company Interests and Histories
- Customizable Reports for Nametags, Registration/Attendance, Walk-Ins and Total Event Revenue

Finance

- Ability to Export Receivables into Peachtree
- Ability to Export Receivables into QuickBooks
- Ability to Generate Cash Receivable Reports to Reconcile Dollar Amounts

Marketing

- Flexible Reporting to Produce a Total Dues, Total Activity and Total Revenue (Support) Reports for Members and Their Appropriate Level
- Ability to Store an Individual's Biography
- Ability to Schedule Reminders to email periodically for Follow-Up Purposes
- Ability to Report on Major Products and Interests of an Individual or Company

Membership

- Can Handle Multiple Membership Types & Tiers
- Supports Multiple Membership Levels based on Due Amounts (still override-able)
- Ability to Store Company Code and Individual Code
- Ability to Re-send Member Dues Invoices
- Ability to Update Membership Dues for 2nd Year Members and Above on an Individual or Group Basis
- Ability to Assign Collection and Sales Representatives to Memberships
- Ability to Identify Different Primary Contacts for Different Membership Types
- Ability to Report % Collected vs. % Outstanding for a Given Billing Month.

Prospecting

- Records Prospect Lead Status (Cold-Hot) with History for Forecasting
- Records Sales Representative with History
- Mechanism for Documenting Trades
- Flexible Commission Calculations

General

- View/Insert/Update/Delete Security
- Input Check to Determine if a New Entity Already Exists When Attempting to Create a new Entity (Company or Individual)
- Ability to Manually Create Notes Detailing Contacts With Individuals
- Automated Notes of Mass emails and Faxes
- Automated Notes of Individual emails and Faxes
- Easy to Extend and Modify in Future
- Restricts Viewing Access to Credit Card Information
- Web-Based
- Allows Members to update Their Own Information
- Invoicing & Payment by Email
- Compatible with Peachtree