

Membership Management Solution (Greytrix Business Manager in Practice)

Greytrix presents a powerful, intuitive **Membership Management Solution** that can help Membership Organisations manage their varying types of members, streamline the registration and accreditation process and the coordination of training courses and events.

It comes with a customisable web portal and can also be integrated into the organisations existing website. In addition, it provides the ability to create courses and events, to communicate course/event information to interested parties, to manage clients' expressions of interest and provide booking confirmations, to prevent over booking of courses/events, and to manage course/event related pricing, including promotional discounts.

Membership Management

This solution enables an organisation to manage all communications and interactions with its members, in a co-ordinated, process driven fashion, thereby ensuring applications and registrations are handled in a timely fashion. It can provide Professional Development functionality to allow tracking of members skillsets. It also ensures the Membership renewal process is fully automated, with members given ample notice of renewal dates and payment options. In addition, it facilitates online payment of Membership fees and ERP integration.

Event Registration

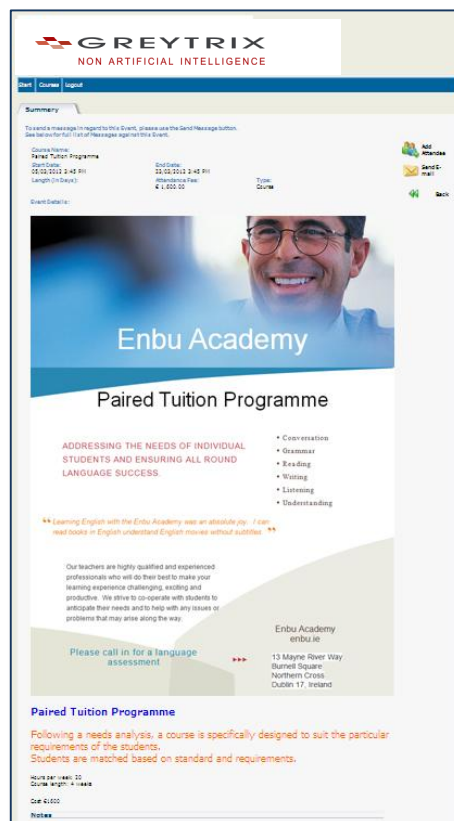
Web User can browse courses / events based on defined criteria such as: category, location or date, find a course/event they're interested in and make an online booking. Since the solution is completely integrated into Sage CRM, the booking details are forwarded directly into CRM.

Membership Management Solution Web Portal – Screenshots.



The Web Portal can also allow members to access secure areas of an organisations website, enabling them to download course material, if needed.

**** Note:** Sage CRM Self Service license is required to run the Web Portal feature



Training / Event Programme Management

In addition, this Membership Management Solution enables the Programme Coordinator(s) to manage key resources and schedules with ease. They can get an update on course/event registrations and potential revenue, at the touch of a button and manage course/event communications all from the one place.

Course Registrations – Screenshot.

The screenshot displays two main components of the CRM software. On the left, a table titled '6 Records Found, Page 1 of 1' lists attendees with columns for 'Person', 'Attendance Status', and 'Created Date'. The attendees listed are Alex Morewood (Pending), Alan Gibson (Confirmed), Betty Moss (Confirmed), Wilmer Annala (Cancelled), Chris Takemashi (Confirmed), and D Smolinski (Confirmed). On the right, there are buttons for 'Add Attendee', 'Import attendees from CRM Group', and 'Create Group from attendees'. Below this is the 'Resource Planner' interface, which shows a calendar view for Tuesday 26 January, 2010. It features a grid with columns for resources: Fred Jones, John Finch, Conference Room 1, Meeting Room 1, and Projector x300. Each resource has a color-coded bar indicating its availability and associated details like users, company, and event status. To the right of the planner are 'Communications Filter' and 'Resource Filter' panels with dropdown menus for action, status, users, and resource types.

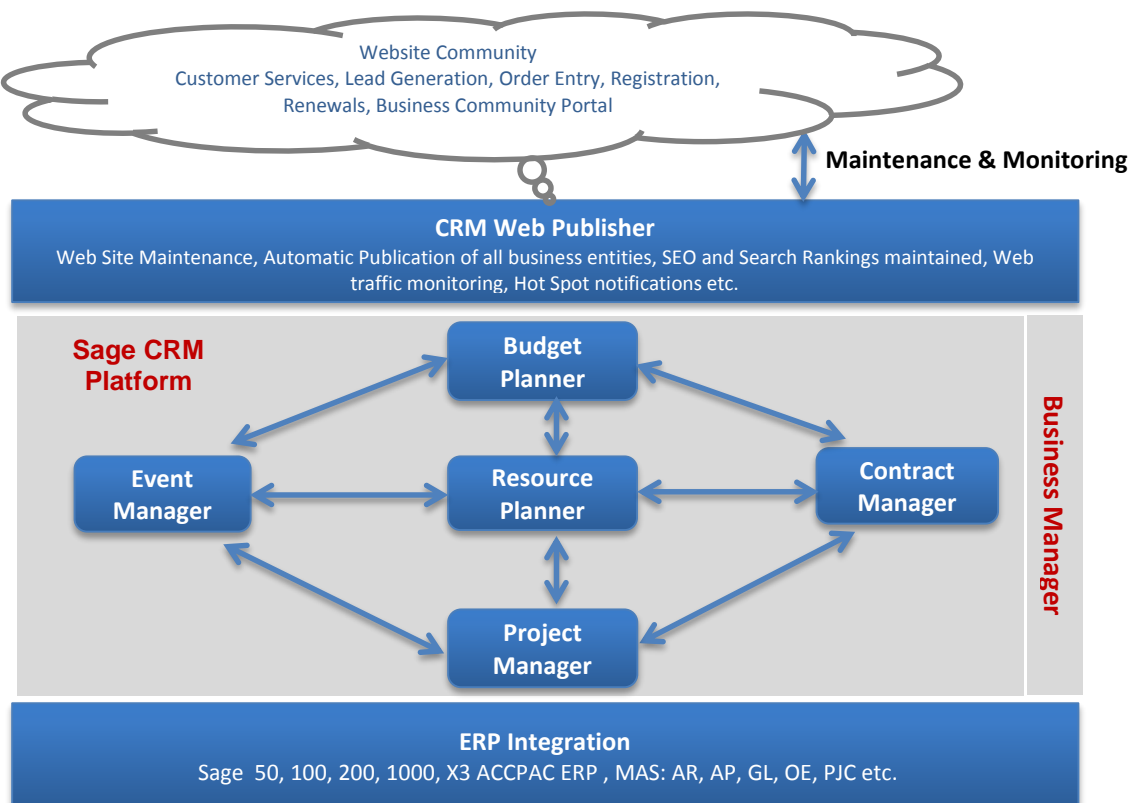
Resource Management – Screenshots.

Apart from being able to see resources free and busy times, the Membership Management Solution ensures that they cannot be double booked!

Members, trainers and programme coordinators can login and access relevant information anywhere, anytime, using laptops, smart phones or tablets.

Supported by Greytrix CRM Event Manager, CRM Resource Planner and CRM Contract Manager products running in the Sage CRM environment, this is the perfect solution for all membership management needs. It incorporates all the benefits of CRM including user interface design, searching, reporting and document management.

Gryetix Business Manage



CRM Event Manager, CRM Contract Manager and CRM Resource Planner are three of 5 products that make up the **Greytrix Business Manager (GBM)** Suite.

For more information on Greytrix Products and Services, write to us at sage@greytrix.com
Website: www.greytrix.com | Blog: <http://www.greytrix.com/blogs/sagecrm/>