



## Total Contact Management

- Multiple addresses, phones, emails per contact
- Track complete employment/work history
- Easily associate people with companies
- Create custom fields against your contacts
- Create custom lists against your contacts
- Allows multiple memberships, events, and purchases
- Track all communications for a complete contact history
- Multiple addresses, phones, emails and other contact info
- Allow contacts to assume multiple roles with your org
- As administrator, view contacts across entire Local



## Controlling Membership

- Create memberships specific to your organization
- Easily make them available online through your website
- Process membership applications online
- Multiple dues allocations offer tremendous flexibility
- Multiple invoices & multiple payments per membership
- Package membership offers with products or materials
- Retain members with tools designed to facilitate renewal
- Effortless reporting makes decision support a breeze
- Each local can customize its dues offering
- As administrator, view dues across the entire association



## Education

- Course and Class Management and Setup
- Applicants and Student Roles
- Multiple logins from staff to students
- Track assignments and lesson plans
- Flexible grading and Attendance Tracking functions
- Custom calendars to each role
- Manage your Journeyman as they take classes
- Easy and flexible upgrades process



## Custom Content Pages and Document Management

- Edit your own web content for your organization
- Publish pages that are only internally seen
- Facilitate communication through announcements
- Store documents and manage your org's files
- Create document links through your website
- Share files with other regions within your Local



## Tasks and Communication

- Tasks provide an internal means of achieving org goals
- Tasks can be assigned to one or many people
- Tasks can have related comments and documents
- Messaging occurs system wide through many processes
- Easily message internal and external users
- View tasks by calendar and grid view



## Analytics & Reporting

- Develop custom report templates for all grid style output
- Combine custom queries with templates
- View membership data demographically
- View memberships by region(s)
- Associate queries and report templates with data grids
- View dashboard and summary information site wide



## Custom Fields & Lists

- Custom fields can be created against any object
- Customize the data type for each field implemented
- Custom lists can be created against any object
- Track all communications for a complete history



## Administration

- Define organization wide settings
- Define your organizational structure (regions)
- Define custom organizational settings
- Define new users and user groups
- Set permissions by user group for easy administration
- Define custom settings that personalize your use



## Remittance and Benefits

- Remittance Capture with custom view for contractors
- A single interface provides access to ALL remittance data
- Sophisticated Contract Management
- Benefit application support and management
- Support for Disbursements (benefit payouts)
- Account management within financials