Do so much more.

WITH

Atlas

by MemberClicks

Atlas is our robust, all-in-one membership management software, built (and supported) with love.

Read on for an in-depth overview of all features and capabilities Atlas has to offer.

MemberClicks

Atlas

by MemberClicks

Atlas, a MemberClicks software solution for mid-sized associations and chambers of commerce, is a membership management system designed to create a refreshing, streamlined experience for both your staff and your members.

MemberClicks is here to save you time, be an extension of your staff, and to help you elevate your organization to the next level. We want to be your trusted technology partner!

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Are you:

Tired of the lack of connectivity between profile management, event history, and financial data? Looking for tools to grow membership and demonstrate value for higher retention and member engagement?

If so, you can streamline your technology and eliminate the need for multiple systems with MemberClicks! MemberClicks is a software solution designed to make your organization run smoother and your job simpler.

"The CRM is robust, providing great reporting and easy ways to use the data to grow our business and truly look after the needs of our members. The new UX experience is a very exciting development and a testament to the positive evolution of the program, but it's the service that truly makes the difference. The MemberClicks team is engaged in helping you succeed both by providing great training and a helpful hand when all else fails."

Cheryl Wirch-Ryckman
Greater Victoria Chamber of Commerce

Our membership management software enables you to:

- Manage an unlimited number of profiles with a true customer relationship management system.

- Configure, automate, and track your finances with multiple accounting software integrations.

- Generate and share comprehensive reports on members, referrals, events, revenue, and more.

- Plan and promote events of all sizes with robust event management tools.

- Easily manage responsive web content through our intuitive content management system, or an integration with a third-party provider.

- Extend the functionality of your software with various add-on and integration options, as well as API access.

- Streamline your retention process using communication and project tools

- And more!

NOTE *Administrative controls, system configurations, and features differ by software package. Make sure to ask us about the different packages and features included in each. Let's work together to create a package that works for you!*
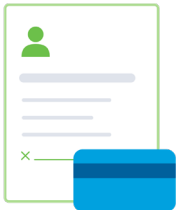
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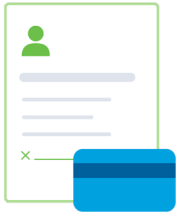**Reporting**
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Membership Management

Conveniently store all member and prospect data in a way that allows you to easily access and manage profiles, track engagement, create workflows, and glean valuable insights.

- Manage unlimited prospect and member profiles.

- Eliminate data duplication with flexible profile relationships.

- Relate multiple subsidiaries to a single parent organization.

- Create an unlimited number of custom fields for profiles.

- Create project templates to easily manage follow-up tasks and communications with members.

- Configure drop settings to streamline and automate aspects of your drop process.

- Store and archive important documents/content records directly within profiles.

- Easily update, merge, and restore profiles.

- Configure and track custom membership levels to automate new member onboarding processes.

- Track and manage member benefit usage.

- Generate comprehensive referral and value on investment reports to quantify membership value.

- Provide self-service options that enable users to update their profile information, preferences, etc.

Sales Management

Effectively manage your prospects throughout the membership sales cycle and ensure the development of long-term relationships with active and prospective members.

- Import new prospect lists, identify and target your best prospects, and personalize communication for effective campaigns.

- Add new prospects any time, any place, from any device.

- Generate automated to-do lists to efficiently manage prospecting activities and campaigns.

- Identify and track sales opportunities.

- Access a built-in Top Category report to easily evaluate the popularity of your online membership categories and leverage this data to drive new member acquisitions.

Events

Event Management

Promote and execute top-notch events with the tools to manage every step of the planning process — all while creating a seamless registration experience that your members will love.

- Integrate event registration forms with your website, enabling attendees to securely register and pay for events online.

- Track attendance-based continuing education units on member profiles.

- Easily manage event registration options, including the number of attendees, breakout sessions, specialized pricing (like member and non-member), table assignments, sponsorship opportunities, etc.

- Allow members to cash in benefits outlined in their profile.

- Create custom promo codes to incentivize registrations.

- Include social media sharing options so attendees can share their registration and promote your event to their network.

- Accept and manage individual attendee or group registrations.

- Automatically email receipts and registration confirmation using customizable confirmation messages.

- Accept event registrations and payment onsite.

- Link event registration and payment information to member profiles for your records.

- Quickly email all or a select group of registrants and/or attendees.

- Automatic integration between your event module and your members' engagement history.

- Display event information on your website with a searchable and filterable calendar.

- Access built-in dashboards for instant visibility of event attendance and revenue performance statistics that update in real time.

Conference & Event App

If you're looking to take your event to the next level, consider a mobile app designed to engage your attendees and vendor partners before, during, and after your event.

See page 14 for more information.

- Customize the app with your organization's or event's branding.

- Allow attendees to access the schedule, venue map, a variety of directories, and more from their fingertips.

- Sync to your Atlas database so registrants are automatically added to the event roster.

- Send push notifications to update attendees in real time.

Have **bigger** events with **more** needs?

Enter ePly – our robust, stand-alone event registration system.

Build mobile-friendly registration forms, see real-time attendee data, track payments and finances, and more! Ask your Sales Executive for more information.

ePly

Financial Management

Manage, track, and report on your organization's finances with a financial management powerhouse that integrates with your existing accounting software.

- Directly post to your accounting software via your Atlas database with integrations with QuickBooks, QuickBooks Online, Dynamics GP, and Intaact.

- Manage accounting packages for multiple entities (a PAC, foundation, young professionals group, etc.) within a single database.

- Establish controls over different forms of payment with cash receipts management.

- Set up recurring billings for any dues structure or non-dues revenue.

- Create ad hoc invoices individually or in batch.

- Manage related revenue items to add optional contributions (such as PAC contributions), or split dues payments across multiple types of revenue.

- Automatically charge a credit card or ACH for recurring billing.

- Securely accept credit card or ACH payments with PCI-compliant integrated payment processing.

- Track aged receivables, collections, deferred revenue recognition, reconciliations, and more with advanced reporting.

- Allow members to save card details for future purchases. *Note: This only is applicable if there is one payment gateway.*

- Record transactions using an accrual, cash-basis, or hybrid method of accounting.

Communication

Communication Management

Effortlessly contact everyone in your database or identify specific groups to receive targeted communications.

- Set up emails to automatically send on a recurring basis (like new member welcome emails, renewal notifications, etc.).

- Personalize communications with profile data fields, including name, renewal amount, contact information, etc.

- Add unique self-service links to direct members to pay their bill online, update their contact info, view their referral report, and more.

- Generate reports on email marketing performance statistics, including email open and click-through rates.

- Archive communication history and automatically keep records of communications in-profile.

- Build unique lists based on attributes that you define (demographic characteristics, member interests, activities, geographic location, etc.) for targeted communications.

- Create custom HTML email templates and save for future use.

- Integrate with third-party communication software such as Constant Contact, MailChimp, or Informz.

Data Management

Reporting

Quickly access the information you need to make data-driven decisions that best serve your members and support the growth of your organization.

- Quantify and prove membership value with referral, value on investment, and engagement reports.

- Access a library of built-in reports, including profile, member, referral, event, revenue, contact, committee, task, sales opportunity, admin, web, and exception reports.

- Track and manage essential financial metrics including accounts receivable, open invoices, payments processed, outstanding payments, adjustments and reconciliation reports, and more.

- Leverage the ad-hoc reporting tool to customize data exports with any fields and filters.

- Build your own report library by saving queries.

- Improve organizational transparency by sharing custom reports with key stakeholders.

- Email reports as PDFs, Microsoft Word, or Excel documents.

- Conveniently access key reports via your customizable dashboard.

- Access SQL writer tools to allow advanced users to write custom data queries.
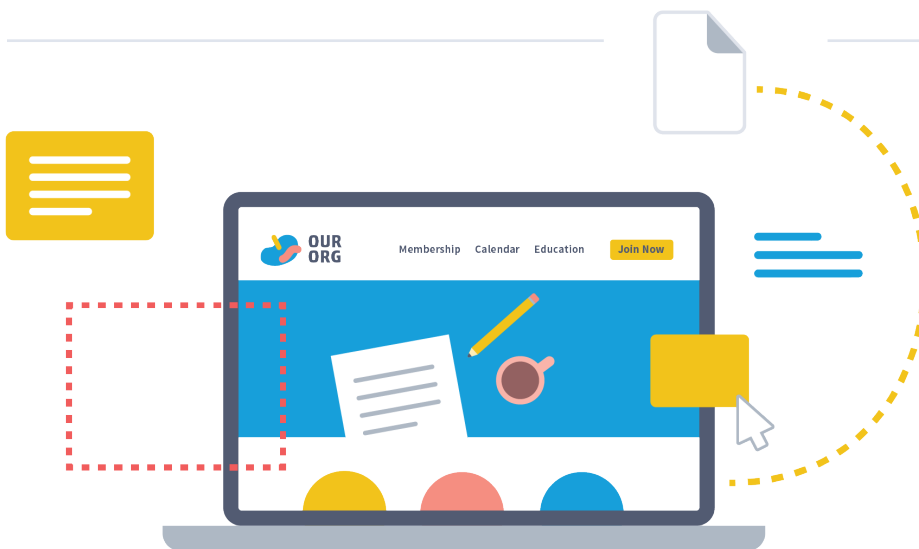
Website & Content Management System (CMS)

Elevate your organization's brand and reinforce its credibility while effectively engaging your members and prospects with a modern, responsive website. Our easy-to-use content management system empowers your team to effortlessly maintain an industry-leading site that integrates with your database.

Website

- Choose one of our responsive design packages to give your organization a modern look on all devices.

- Create new pages, add photos and videos, and make real-time content changes in seconds with our drag and drop website editor. (No HTML experience required!)

- Enhance your site with informational widgets, including new member announcements, events, news, and sponsor scrollers.

Content Management System (CMS)

- Enable members to update their profile information and preferences:
  - *Set preferences*
  - *Upload logos*
  - *Pay bills online*
  - *View members-only resources (news, calendar, content, protected committee docs, etc.)*
  - *Ability to update all related profiles*
  - *View referral report*
  - *Directory offerings (coupons, deals, etc.)*

- Integrate your site with your database and populate information for your membership directory, news, event calendar, membership applications, members-only portal, forms, banner ads, coupons, and more.

Happy with your current site?

We can seamlessly integrate it with your database and skim your components (member directory, members-only portal, event calendar, etc.) to match your existing site.

Contact a Sales Executive for more information regarding website and CMS pricing.

Committee Management

Manage your committees and retain those volunteers by providing an organized, productive experience for everyone involved.

- Track and manage committee meeting attendance, agendas, and minute details.

- Communicate quickly with committee members.

- Organize committees based on custom committee types.

- Increase engagement and knowledge using committee history logged on the profile level.

- Create individual meeting records for every meeting.

- Use committee reports for insights into meeting attendance history, meeting details, and more.

PRINCETON MERCER
REGIONAL CHAMBER

"[MemberClicks] seems to know every problem that a chamber encounters and they have a report or a solution to solve them all. The onboarding was very good and the system is easy to learn for our new employees."

Lorraine Holcombe, *Executive VP and CFO,* Princeton Mercer Regional Chamber of Commerce

sbi

"Over the last seven years almost all of our clients have moved to MemberClicks for more efficient, streamlined services. Working with MemberClicks has been a fabulous partnership because there has been a lot of reciprocal help. We recommend them to nearly all of our clients, and it's easy to train our people on the software."

Lindsay Jennings, *Director of Marketing and Events,* SBI Association Management

MPA

"The dashboard gives us an excellent snapshot of where our numbers are and makes it easy for us to navigate to all the different areas we need. I can't say enough about how wonderful it is to work with MemberClicks. This is one of the best database management systems I've ever worked with and the staff is truly incredible."

Robyn Silvey, *Chief Operating Officer,* Missouri Pharmacy Association

Looking for more?

Here at MemberClicks, we're always developing more tools to help your organization grow and succeed. Take a look!

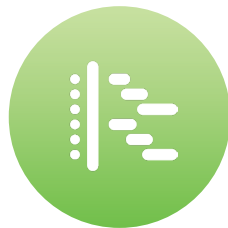**Learning Management System**
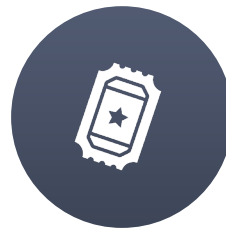
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MC | LMS

Our full-scale Learning Management System (LMS) enables education-focused organizations to affordably and easily build a learning program for their members. Also, easily store and distribute content to your members via a learning management system.

- Seamless integration between the LMS and your MemberClicks AMS.

- Easy-to-use experience for your members to view content and take the necessary assessments.

- Manage, organize, and safely store your documents and videos.

- **NEW!** Admin dashboards provide high-level insights into course packages, users, and overall course completion.

- Increase the value of your association's membership by offering members-only content.

- **NEW!** Host members-only webinars directly through the LMS platform.
  With TelSpan integration

- Robust reporting capabilities to pull reports at the user or course level to track completion and progress of everything from certificates, CEUs, and beyond.

Conference & Event App

Take your event to the next level with a mobile solution designed to engage your attendees and vendor partners before, during, and after your event. Impress your attendees with an app customized with your organization's or event's branding!

- Allow attendees to access the schedule, venue map, a variety of directories, and more from their fingertips.

- Sync the app to your MemberClicks database so registrants are automatically added to the event roster.

- Send push notifications to update attendees in real time.

- Collect survey feedback during and/or after the event.

- Promote event sponsors throughout the app to increase their visibility.

- Display directories of attendees, sponsors, and speakers for easy searching.

Benefits Management

Easily track and manage all the tangible benefits members receive through membership levels or sponsorship packages. You can also allow members to manage their own event benefits!

- Easily apply benefits to new and renewing members using Member Levels.

- Streamline event management by allowing members to access and pay using their assigned benefits.

- Track and manage usage history seamlessly on each member's profile.

- Engage and retain a wider audience by giving members the opportunity to participate at their preferred level of involvement.

- Use the benefits listed in each package as a marketing tool to communicate the value of membership and increased investment.

Sales Management

Give your team the ability to track and manage all sales and prospecting activities right inside the system. See the entire life cycle from prospecting to membership based on sales opportunities (records of the items you are trying to sell to a profile).

- No limit to the number of sales opportunities on a given profile, so everything you sell can be managed and tracked inside the system

- Easily analyze and forecast your revenue stream

- Customize lead source codes, probability codes, and lost reason codes to fit your reporting needs

- Utilize Prospect Protection, so that sales reps don't accidentally work with each others' prospects

Project Management

Streamline the documentation and tracking of all important member, prospect, and event processes. Projects can range from logistical efforts to put on a large event to internal procedures staff should follow and document.

- Streamline the management of your member retention plan, including every retention step you take in the first several years of membership

- Document and track the collective effort it takes staff to complete large and important activities

- One-time setup of complex templates that can be applied to any future or recurring projects

- Take advantage of dynamic Task Date Due Assignment based on target completion dates

"Unbelievable support. Beyond comparison. Now all my data is integrated through one input portal... saving me countless hours."

Randy LaBonte, *Chief Executive Officer,* Canadian eLearning Network

- Promote your event with a mobile-friendly registration form and event website.

- Customize your site and registration form to your organization's or event's branding.

- Track payments and other financials in one system.

- And much more!

Stand-Alone Event Registration & Website

If your event management process is more robust and you're interested in a stand-alone event management solution, we've got you covered, too! Plus, consider an event website to really make your event stand out!

Job Board

Drive membership growth, generate non-dues revenue, and provide exclusive career opportunities for your members and industry with our easy-to-use tool that integrates seamlessly with your MemberClicks database and website.

"[We've gotten] more paid listings in a matter of weeks than we see in a year!"

Kiri Stroh, *Operations Director, New Hampshire Providers Association*

- No setup costs!

- Easily post jobs through our simplified solution. (No more manually posting jobs!)

- Immediately see listings within seconds of posting – creating instant value for employers.

- Mobile-friendly for a seamless experience across all devices.

- Partnership is structured as a revenue share where the association will receive a percentage of the revenue generated.

See how we stack up

We strive to be the absolute best option for our customers. See the breakdown here, or visit capterra.com for more information, and to see real customer reviews.

Capterra	OVERALL	FUNCTIONALITY	EASE OF USE	VALUE FOR MONEY	CUSTOMER SUPPORT
MemberClicks n = 71 reviews	88	83	82	88	94
NeonCRM n = 24 reviews	85	82	80	85	90
YourMembership n = 34 reviews	82	77	77	86	88
Wild Apricot n = 34 reviews	80	78	79	71	71
Membership Management Category Average n = 2,542 reviews	87	84	83	86	88

Reviews Insights Competitive Comparison is based on end-user reviews from Capterra. Average ratings and review counts include published reviews within the 12-month trailing year of the publication date. Read more at **capterra. com/membership-management-software.**

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We love a good success story.

"With MemberClicks, we've grown from a database of about 2,000 contacts to a database of more than 5,000 contacts. MemberClicks is easy on your checkbook, easy to start up, and easy to learn. The team is helpful, knowledgeable, and with you all the way!"

Susan Brinkhaus, CAE, *Executive Director*
Salon & Spa Professional Association

SALON & SPA PROFESSIONAL ASSOCIATION

"Using MemberClicks has enabled our AMC to effectively and efficiently manage our clients… The constant updates to the platform honestly let me know that MemberClicks actually listens to the suggestions of its users. The support staff is one of the most diligent and responsive groups of individuals that we've had the pleasure of working with."

Kalu Azu, *Financial Coordinator*
Clemons & Associates, Inc.

CLEMONS
& ASSOCIATES, INC.

Read more customer stories at blog.memberclicks.com/case-studies

Ready to see for yourself?

The best way to assess whether MemberClicks is a good fit for your organization is by seeing it in action on a free demo. A demo gives you the opportunity to discuss your specific needs with a Sales Executive, obtain immediate answers to your questions, and see how the actual product operates.

You can see it in action at no cost or obligation!

To schedule a demo, email sales@memberclicks.com or call 800.914.2441.

MemberClicks