

MEMBER COMMUNICATIONS

CAREER CENTERS

AMS SOLUTIONS

EVENT MANAGEMENT

ONLINE LEARNING

MANAGEMENT SERVICES

# Complete Feature List

Naylor AMS offers an all-in-one software solution to power both your association and your website. Our AMS software includes a comprehensive website content management system that will provide your association with a new site and member portal that instantly integrates your member data.

All system modules are included and easy-to-use.

With Naylor, you will be free to focus on your members because our software makes your association easy to manage.



## SYSTEM MODULES

- ✔ Membership & Dues Management (AMS)
- ✔ Website Development & Hosting
- ✔ Mobile & Tablet Friendly Website Design
- ✔ Event Management & Registration
- ✔ Committee Management
- ✔ Online Directory
- ✔ Financial Management
- ✔ Mail Blasts, Texts & Voice Broadcasts
- ✔ Reporting
- ✔ Donation Management
- ✔ Task Management
- ✔ Document Resource Library
- ✔ Exhibitor and Booth Sales Management
- ✔ Certifications/CEU's
- ✔ Online Quizzes /Polls
- ✔ Blog
- ✔ Member Forum
- ✔ Surveys, Ballots & Form Building
- ✔ Job Board
- ✔ Product Sales & Digital Downloads
- ✔ Banner Ad Management
- ✔ Online Newsletters

## DATA CONVERSION AND DATA IMPROVEMENT

- ✔ Number of Contacts
- ✔ Standard Data Import from CSV
- ✔ Data Conversion from a Simple File or Table
- ✔ **Included**
- ✚ **Add-on at cost**
- ✚ Data Conversion from Multiple Sources
  - Duplicate, Merge, Purge Processing
  - CASS Physical Address Accuracy
  - NCOA Physical Address Accuracy
  - Email Address Accuracy
  - Phone Number Validation

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## UNLIMITED SUPPORT

- ✔ Online Support Ticket Portal
- ✔ Standard Phone Support  
M-F, 8am-5pm EST
- ✔ Emergency Phone Support - 24/7/365
- ✔ Email Support
- ✔ Product Updates
- ✔ Access to User Group Forum

## TRAINING

- ✔ One-on-One Training
- ✔ Group Training Webinars Each Week
- ✔ On-Demand Training Videos
- ✔ Product Documentation and Knowledge Base
- + On-Site Training

## CONCIERGE IMPLEMENTATION SERVICES

Naylor's concierge implementation service provides a dedicated implementation manager that will assist you throughout the entire process and will visit your team on-site for additional hands-on setup and training. This level of consultation will save you time, money, resources, and team headaches.

- + On-Site
- + Web-Based

## ADDITIONAL SERVICES

- + Email Template Creation
- + API Access to Existing Partners
- + API Access for Developers
- + Website Content Migration

✔ **Included**    + **Add-on at cost**

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## Member Management

Naylor AMS Solutions Profile Management is simple to use. The search menu provides access to all member data in the system and related information.

We provide you the ability to update a phone number, view recent transactions, print reports, register for an upcoming event, print invoices and more. With each modification, you can review the account history to assess the life-cycle of changes per contact.

### Highlights:

- Add new fields for the organization or individual contact profile
- Create flexible member types, dues structures, and installment plans
- Supports anniversary and calendar date-based membership dues
- Create pro-rated membership dues categories
- Schedule automatic email renewal and expired notices
- Manage one or multiple representatives under each membership
- View financial activities per member, by transaction type, or membership-wide
- Manage committees, committee web-pages, rosters and positions
- View vital reports on membership statistics and financials
- Schedule tasks to follow-up or complete member activity
- Generate and print invoices

## CONTACT PROFILES

- |   |                                   |  |
|---|-----------------------------------|--|
| ✔ Multiple Search Menus                   | ✔ Account History                 | ✔ Field Change Audit Log                             |
| ✔ Individual Memberships                  | ✔ Custom Profiles Per Member Type | ✔ Activity History                                   |
| ✔ Company Memberships with Multiple Reps. | ✔ Task Management                 | ✔ Multiple Addresses, Phone Numbers, Email Addresses |
|   | ✔ Add Fields On-Demand            |  |

## DUES MANAGEMENT

- |   |                                 |                                 |
|---|---------------------------------|---------------------------------|
| ✔ Renewal Auto-Billing Via Credit Card* | ✔ Pro Rated Terms               | ✔ Online Membership Application |
| ✔ Grace Periods                         | ✔ Variable Dues Calculations    | ✔ Multiple Expiration Options   |
| ✔ Dues Installment Options              | ✔ Manage Incentives & Penalties | ✔ Batch Invoice Generation      |
| ✔ Calendar/Anniversary Membership Terms | ✔ Donations                     |                                 |

\*With Sage Payment Solutions

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## Member Portal

The Naylor AMS Solutions Member Portal is a one-stop online portal for your members to manage their own membership information. Once members login they will see customized menus for them to manage their information, their committee affiliations, renew their membership, register for events, and so much more. As an admin of the database, you can track what important demographic information they change such as last name, address, and phone numbers through audit logs.

### Naylor AMS Solutions:

- Update contact info
- Manage organization profile
- Add or modify colleagues in org memberships
- Renew online and pay via credit card or invoice
- Register for events
- Manage committee and group participation
- View members-only website content
- View and manage the listing in the online directory
- View all transactions and receipts for payments
- View and pay invoices
- Search and post Job Board opportunities
- View certifications earned
- Take online quizzes

## MEMBER PORTAL DESIGN

- ✓ Fully Branded
- ✓ Fully Integrated
- ✓ Responsive Design
- ✓ Customizable Member Menu

## MEMBER PORTAL FEATURES

- ✓ Profile Management
- ✓ Organization Dues Management
- ✓ Contact Dues Management
- ✓ Committees & Chapters
- ✓ Event Registration
- ✓ Online Directory
- ✓ Members Only Pages
- ✓ Directory Preferences
- ✓ Billing Preferences
- ✓ Transaction History
- ✓ My Invoices
- ✓ Online Renewal
- ✓ Continuing Education
- ✓ Member Forum
- ✓ Online Exams

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## Website

Naylor's Content Management System is easy-to-use and fully integrated with the membership database. Novice and expert association staff will gain the ability to efficiently develop and manage website content, events, and photo galleries. They'll also be able to modify the navigational links on the site and create great looking pages that include tables, links, photos, document attachments and more. Built in HTML5, CSS3, and fully responsive, all pages are compatible in all browser versions. Mobile and tablet versions of the site are automatic and included with every project.

### Highlights:

- The CMS is simple to use - no prior HTML or web management experience is required
- Staff can switch back and forth between the familiar "word-processing-like" editing tools and the traditional HTML code views
- Images can be inserted from your desktop
- Responsive design for best experience no matter what device your users are on

## WEBSITE

- ✔ Fully Branded
- ✔ Responsive Design
- ✔ HTML 5, Bootstrap 3
- ✔ Your Association's URL

## KEY FEATURES

- ✔ Manage Navigation Menus
- ✔ Web Page Management with Audit History
- ✔ Manager Only Pages
- ✔ Site Search
- ✔ Page Scheduling
- ✔ Photo Gallery
- ✔ Document Download Center
- ✔ SEO Tools
- ✔ Auto-Site Map
- ✔ Custom Page URL's
- ✔ Web-Based File Upload
- ✔ Web-Based File Library
- ✔ Web-Based Restricted Files
- ✔ Event Calendar
- ✔ Main Page Poll
- ✔ Main Page Image Slider
- ✔ Multiple Widgets

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## Events

Naylor's software supports unlimited event management and online registrations. The registrations are simple to set up for the staff and easy to sign up as a member or guest. Most registrations can be up and running in less than thirty minutes.

The registration process offers multi-day registrations, multi-tiered prices by member type, and non-member pricing plus promo code discounts. Opportunities are included to sell items in conjunction with the registration including tracks and sessions. Multiple contacts can be included on the single registration form and all are notified via email. Event specific questions can also be displayed on the form.

### Highlights:

- Early bird, regular price and late registration prices available per event
- Event wait list for pending registrants
- Allow online registration modification's by the registrant up to a specific cut-off date
- Registrations available to the public, membership or both, all at differing registrant rates
- Members can register multiple people from the same organization in the same credit card transaction
- Multiple pricing structures are available per event and are based on member types

## EVENTS

- ✓ Daily/Weekly/Monthly Calendar Views
- ✓ Auto Mapping of Event Location in Google & Yahoo Maps
- ✓ Save to Outlook, Gmail, and Yahoo
- ✓ Members-Only Events

## REGISTRATION

- ✓ Early/Regular/Late Term Pricing
- ✓ Type Member Prices
- ✓ Invoice Payment Option
- ✓ Public Registrations
- ✓ Spouse/Guest Registrations
- ✓ Group Registrations
- ✓ Event Specific Questions
- ✓ Account Credits
- ✓ Promo Codes
- ✓ Tracks & Sessions
- ✓ Product Upsells
- ✓ Auto Confirmation Receipts
- ✓ Failed Registration Report
- ✓ Comprehensive Dashboards
- ✓ Assign CEU Credits

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## Committees/Chapters

Naylor allows you to effectively manage groups, committees and chapters. This powerful feature lets members opt in or out of groups and allows you to create rules that screen applicants and determine how the application process is managed.

### Highlights:

- Record and maintain membership information and participation history including term dates
- Members can opt in and out. Requests may require chairperson or staff approval
- Committees participation can include additional committee dues (paid online) and term limits
- Chairperson has access to manage web pages representing the group
- Chairperson can view and export the committee membership's roster
- Assign positions and titles to individual contacts participating in one or more of the committees
- Multiple view settings determine how committees and the associated join options are displayed
- Attach electronic copies of minutes, position papers and other committee communications

## KEY FEATURES

- |                               |   |
|-------------------------------|---|
| ✓ Track Titles & Positions    | ✓ Email Lists & Roster                      |
| ✓ Track Participation History | ✓ Web Pages                                 |
| ✓ Group Eligibility Rules     | ✓ Leadership Access: Download Roster        |
| ✓ Group Visibility Rules      | ✓ Leadership Access: Mail Blasts            |
| ✓ Terms & Expirations         | ✓ Leadership Access: Post Files             |
| ✓ Charge Dues                 | ✓ Leadership Access: Manage Committee Pages |

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## Continuing Education

### KEY FEATURES

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- ✔ Link CEU's to Events
- ✔ Link CEU's to Online Exams
- ✔ Expiration Dates
- ✔ CEU Renewal Fees
- ✔ Print/View Certificates
- ✔ Print/View Transcripts
- ✔ Integration to Path LMS

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## Online Directory

Naylor AMS Solutions clients use the directory as the reference resource for the public or members. As a supplement or replacement to the printed versions, the online directory updates automatically with any information changed by the member or staff.

### Highlights:

- Search on contact name, directory category, radius search and more
- Basic listing and enhanced listing capabilities
- Non-dues revenue upsells
- Display members in multiple directory categories
- Members can upload logos and photos
- Members can opt-in and opt-out of directory and select listing information
- Auto-address mapping to Google Maps
- Directory generated emails are tracked in member's referral history report

## KEY FEATURES

- ✔ Multiple Listings Types
- ✔ Multiple Listing Categories
- ✔ Multiple Search Queries Including Radius
- ✔ Members Can Manage Information Displayed
- ✔ Ability to Limit Listing Participants
- ✔ Non-Dues Revenue Features

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## Online Newsletters (Web-Based)

Naylor AMS Solutions Article Builder offers an alternative to a PDF posting of current online publications. Build web-based editions of content with articles, photos, captions and more.

When the next issue is ready to be published online, older content is “archived” and accessible by keyword searches. Article Builder’s powerful content production capabilities create and automatically lay out the editorial, photos, sidebars, headlines and more.

### Highlights:

- Articles include images, sound files, movies, and documents
- Each article includes a “Print Article” and “E-mail a Friend” icon
- Built-in scheduling system allows articles to be automatically published and retired from the website
- Published articles or retired associated pages are updated simultaneously - eliminating broken links and “orphaned” content
- View article hits, views and ratings to provide valuable insight to modify and improve the user experience
- Extra Membership Value Editorial content can be created and set for public or private viewing
- Group-based access rights determines which viewers can access articles by article basis

## KEY FEATURES

- ✓ Template Driven
- ✓ Article Archives
- ✓ Article Scheduling
- ✓ Multimedia Support
- ✓ Featured Articles
- ✓ Related Articles
- ✓ Enhanced Search Engine
- ✓ Member Only Content
- ✓ Article Comments

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## Surveys

Survey Builder lets you create online forms from simple one question polls to complex multiple page/multiple question surveys. Several access rights are available and range from open public access to participation only by pre-authorized individuals.

### Highlights:

- Choose from 21 question types, which include all basic questions, plus advanced questions such as matrix questions, ranking, and constant sum
- Unlimited number of questions distributed over multiple pages
- Page conditions (or branching) can be inserted into surveys
- Detailed reporting can be exported via CSV or Excel format

## KEY FEATURES

- ✔ 21 Questions Types
- ✔ Page Condition Logic
- ✔ Unlimited Templates
- ✔ Data Export
- ✔ Advanced Reporting
- ✔ Question Libraries
- ✔ Answer Piping
- ✔ Restricted Access
- ✔ Respondent Levels

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## Job Board

Naylor AMS Solutions Career Manager is an online job-board. Members can post job listings and receive applications. You choose to charge or offer the job board service free to employers. Career Manager highlights:

### For Employers:

- Easy-to-use interface to create job postings and review applications
- Automatic email notification to employer when listings are about to expire
- Detailed employer profile increases exposure and understanding of organization for the applicant
- Complete online history of all applicants per listing
- Full e-commerce capabilities with real-time credit card processing

### Applicants:

- Powerful online job search tool
- No registration required to search jobs encourages public usage and exposure

### Admin Features

- Modify and delete jobs
- Modify and delete employers
- Review and delete resumes
- Modify and delete job categories
- Automated job expiration dates
- Job board statistics include the number of jobs posted, employers, job seekers and active resumes

## KEY FEATURES

- |                        |                         |
|------------------------|-------------------------|
| ✓ Post Positions       | ✓ Powerful Search Tools |
| ✓ Manage Posts         | ✓ Multiple Post Rates   |
| ✓ Submit Resumes       | ✓ Member Pricing        |
| ✓ Member Portal Access |                         |

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## Storefront

Naylor AMS Solutions Store Builder is a full e-commerce shopping cart. All tools needed to build an online storefront are provided. Features include an easy-to-use, web-based menu for store editing and management, catalog maintenance, and order management. Members can purchase items and receive automatic membership discounts for each item.

### Highlights:

#### Store Builder Management

Create categories, sub-categories, products, and attributes within the web-based administration console. Sorting capabilities quickly organize products for display.

Create detailed product descriptions using multiple photos, text and HTML.

Multiple pricing structures provide members and non-members with different product prices.

#### Key Features

- Unlimited products
- Enable and disable products
- Title, introduction, description, longer Description, highlights and teaser
- Unlimited categories within three page levels fields for product details
- Unlimited options and variation of colors, sizes, or add-on options
- Link product to larger images
- Automatic generation of picture thumbnail with link to larger image linking to larger image depending on membership and reseller settings
- Allow or disallow purchase of out-of-stock products
- Temporarily hide products
- Disable product buying function
- List products in multiple categories

#### Order Fulfillment & Shipping

Process credit card payments online.

Option to configure state and/or county sales tax methods - providing customers shipping options.

Checking order status is simple with our instant order email confirmations sent to the merchant and customer.

Receive order by email.

- Export order data
- Automatic updating of order total based on products in Shopping Cart
- Automatic tax and shipping costs calculations prior to check-out
- Auto-populate customer details at check-out for members
- Printable order page
- Adjust order quantities in Shopping Cart
- Real-time shipping cost calculation prior to check out - based on customer location.

## KEY FEATURES

- ✔ Online Shopping Cart
- ✔ Price Overrides
- ✔ Coupon Codes
- ✔ Product Options
- ✔ Product Costs With Member Rates
- ✔ Digital Files Sales

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## Forum

Naylor AMS Solutions Forum Builder is a bulletin board discussion forum used to increase online membership interactions. Forums offer large repositories of searchable information and conversations are saved for future reference. Features include unlimited topics, moderators, customizable permissions, and more.

### Highlights:

- Unlimited number of forums, sub-forums, groups, posts, and polls
- Only forums associated with the member's current forum permission groups will be accessible
- Subscribe to forums and receive email notifications of new posts
- Define default sort preferences and display options for each forum

### Topic Features:

- Flat and threaded topic views
- Printer friendly versions of topics
- Members can edit or delete existing posts based on admin defined permissions
- Subscribe to topics and receive email notifications of new replies
- Email topics to other forum members or external email addresses

### Search Features:

- Search for a discussion thread by title or keyword to immediately access selected forums
- Boolean or natural language search provides relevance ranking
- Ability for admin to define ignored search terms and maximum search string length
- Limit the number of possible search results for each member group or a specific member

### Moderation Features:

- Support for moderated or un-moderated forums
- Assign members as moderators to specific forums
- Comprehensive control over features available to moderators within each forum
- Inline post approval for moderators (insight to how a post relates within the thread)
- Earmark unfriendly users and disable future participation

## KEY FEATURES

- |                               |                       |
|-------------------------------|-----------------------|
| ✓ Flat & Threaded Topic Views | ✓ Subscribe to Topics |
| ✓ Post Feeds                  | ✓ Search Features     |
| ✓ Post Management             | ✓ Moderation Features |

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## Blog

Place your association in the forefront as a thought leader within your industry through blogs. Blogs provide a powerful and cost-effective way to engage members and non-members alike. Having a successful blog creates an avenue where your organization can gain valuable feedback and insight from your audience.

### Highlights:

- Blog Builder supports multiple authors contributing and managing blogs in the system
- Unlimited categories and articles
- Used in conjunction with member manager, blog builder offers online user registration that can allow people to register and maintain profiles and leave authenticated comments on the blog
- Keyword search for current and archived topics
- Allow readers to recommend content and comments they like

## KEY FEATURES

- ✓ Multiple Authors
- ✓ Unlimited Categories
- ✓ RSS Syndication
- ✓ Member Registration
- ✓ Comments
- ✓ Searches
- ✓ IP Blacklist

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## Advertising

Naylor AMS Solutions Ad Manager uploads and manages “in-house” promotions for upcoming events or activities. Banners can generate non-dues revenue from sponsors and advertisers. Determine banner displays and duration of postings. Members, clients and sponsors can select advertising plans that can be sold three ways:

- Run time by specific time duration
- Run time by impressions
- Run time by click-throughs

Ad Builder tracks who sold banners and current reporting. View ad performance and statistics. Supported files types include JPG, GIF and flash.

## KEY FEATURES

- ✔ Online Banner Management
- ✔ Rate Cards
- ✔ Sales Support

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## Financial/Invoicing

Naylor's software records every financial activity, including partial payments and credits in an online ledger. Entries are automatically created by the system for web-based transactions. Create invoices or statements that include previously billed items and calculation of multiple line items. Through the system, you can also manage promotional codes for different processes (i.e., discount codes that can be applied to, or restricted to, certain types of processes).

Generate invoices and receipts for any financial transaction and allow staff to email these from the database. Members have ability to view and pay for all of their transactions and invoices in the membership portal. All transaction line items can be assigned specific GL, classification and item accounting codes.

### KEY FEATURES

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- ✔ Batch Generation
- ✔ Credit Management
- ✔ Payments/ Account Receivable
- ✔ Configure Invoice Template & Terms
- ✔ Prorations
- ✔ GL Accounting (Cash-Based)
- ✔ Automated Receipts
- ✔ Automated Invoices (Pro-Form)
- ✔ Download Activities

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