DynaTech | Systems

Accelerate Business

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What Sets Us Apart

DynaTech's Competitive Advantage

Backed by years of expertise and a team of skilled professionals, DynaTech Systems stands at the forefront of the IT services industry. Our extensive portfolio includes cutting-edge solutions in cloud, ERP and CRM implementation, data analytics, artificial intelligence, and more.

We prioritize long-term partnerships built on collaboration and trust, delivering innovative, scalable, and secure solutions to keep our clients ahead in a rapidly evolving landscape.

AICPA SOC 2

Microsoft Solutions Partner

Great Place To Work® Certified FEB 2025-FEB 2026 INDIA

D-U-N-S® REGISTERED™

ISO 9001:2015

CMMI level 3

150+ Global Projects

100+ Happy Clients

450+ Expert Minds

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DynaTech

Microsoft Cloud Capabilities

Cloud

Azure Infra
Azure Services
Logic Apps
Service Bus
Functions
Event Grid
API Management
Synapse Analytics
Load Testing
Data Factory

Business Applications

Marketing
Sales
Finance
SCM
Commerce
Customer Service
Field Service
Finance & Operations
Project Operations
Human Resources

Low Code)

Power Pages
AI Builder
Power Apps
Power Automate
Copilot Studio

Data & BI

Fabric
Dataverse
Power BI
Customer Insights
OneLake
Data Engineering
Copilot
Data Lake
Data Factory
Data Science
Data Warehouse
Lakehouse
Microsoft Purview
Real-Time Intelligence

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Membership and Association Management

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Association Governance & Leadership

Transform Association Governance & Community Oversight

DynaTech’s Association Management capabilities empower associations, societies, and membership-driven organizations to streamline operations, support governance, and foster stronger community engagement.

01

Chapters, Groups & Committees

Manage chapters, regions, and special interest groups with leadership tracking, community engagement, and reporting.

02

Clubs & Community Structures

Allow members to form clubs or request new communities aligned with shared goals.

03

Corporate & Institutional Memberships

Register organizations, manage employee accounts, assign membership plans, and track renewals.

04

Performance Dashboards

Monitor growth, engagement, and financial health of chapters and groups with Power BI.

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› Create and manage chapters by geography, interest, or institution

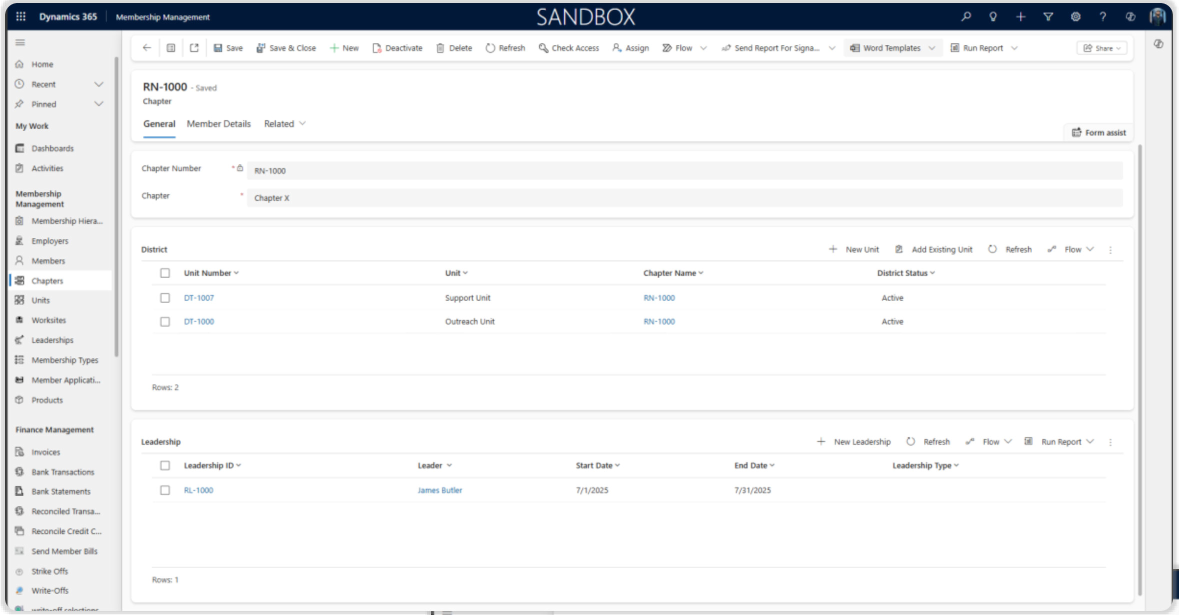
› Assign members manually or auto-assign via rules (postal code, interest)

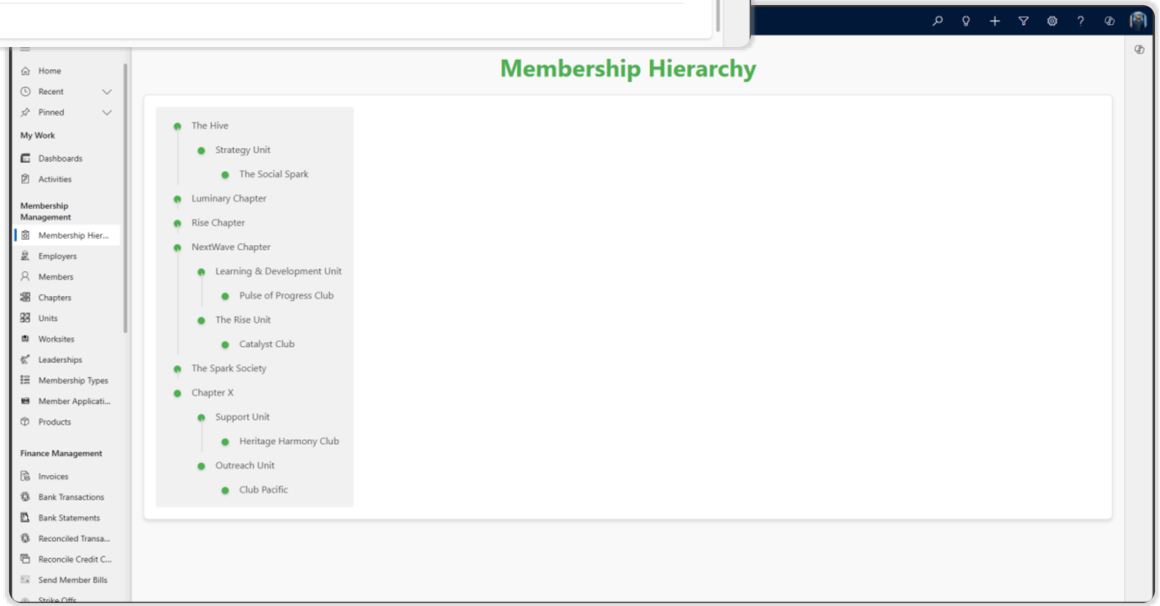
› Allow members to browse & join chapters via portal

› Assign/update chapter leaders with portal access

› Monitor chapter growth, engagement, and financials with dashboards

› Deactivate/archive inactive chapters for clean governance





1. Create and configure groups (committees, task forces, SIGs)
2. Assign or invite members through CRM or portal
3. Members can discover & request to join groups via portal
4. Enable collaboration with group pages, events, and shared documents
5. Track group performance & activity with dashboards

1. › Register and manage corporate, academic, or non-profit organizations
2. › Add and manage employees under parent organization
3. › Assign membership plans with entitlements and seat limits
4. › Simplify renewals with reminders, invoices, and online payments
5. › Provide engagement & usage reporting at organizational level

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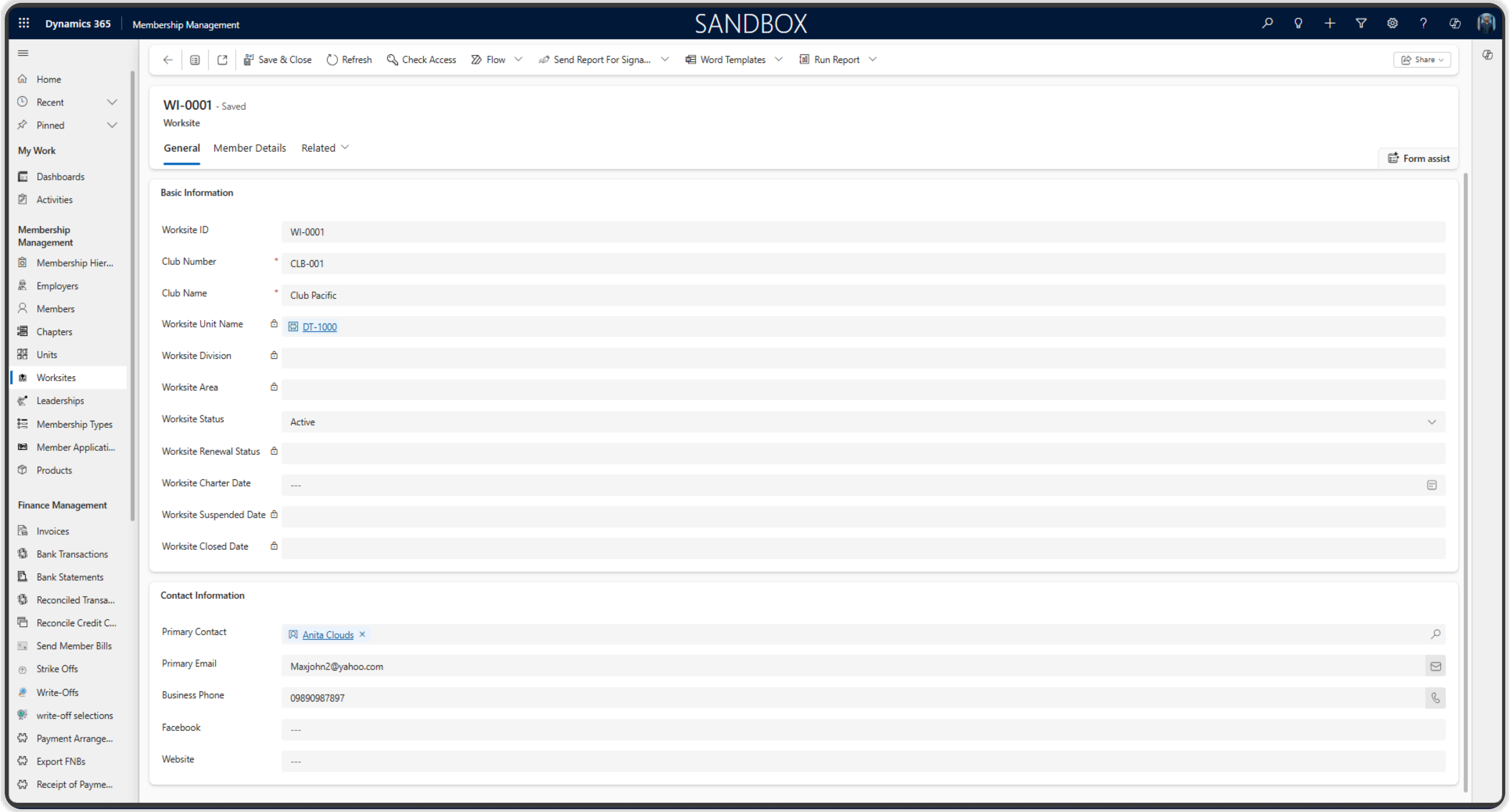
- Create and manage member-run clubs (hobby, professional, social)
- Members can propose new clubs for admin approval
- Browse and join clubs via portal directory
- Club leaders manage announcements, events, and documents
- Monitor club activity and flag dormant clubs for review



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Membership Experience & Lifecycle

Deliver a Seamless Member Journey

Modernize the member lifecycle from onboarding to renewal with automation, personalization, and robust self-service.

Digital membership forms, automated workflows, and configurable membership types

Application & Approval

Flexible dues structures with monthly, annual, and lifetime options

Membership Plans

Automated reminders, recurring billing, and discount options

Renewals & Auto-Billing

Secure membership IDs and recognition badges

Digital ID Cards & Badging

Self-service communication and interest preferences

Member Preferences

Centralized portal for renewals, benefits, events, and certificates

Member Portal

Billing, refunds, discounts, and F&O integration

Financial Management

Retention, churn, and renewal KPIs with predictive insights

Analytics

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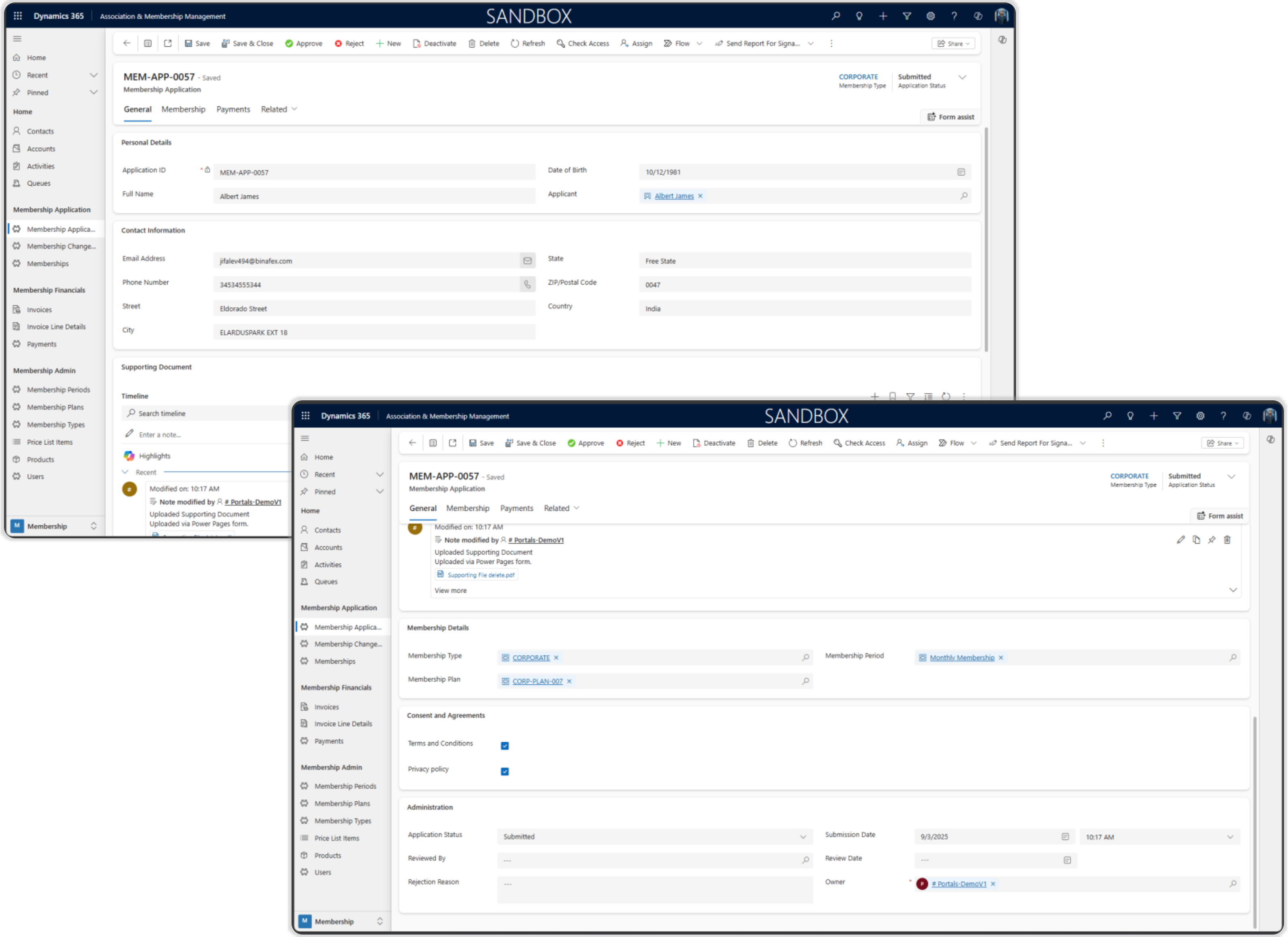
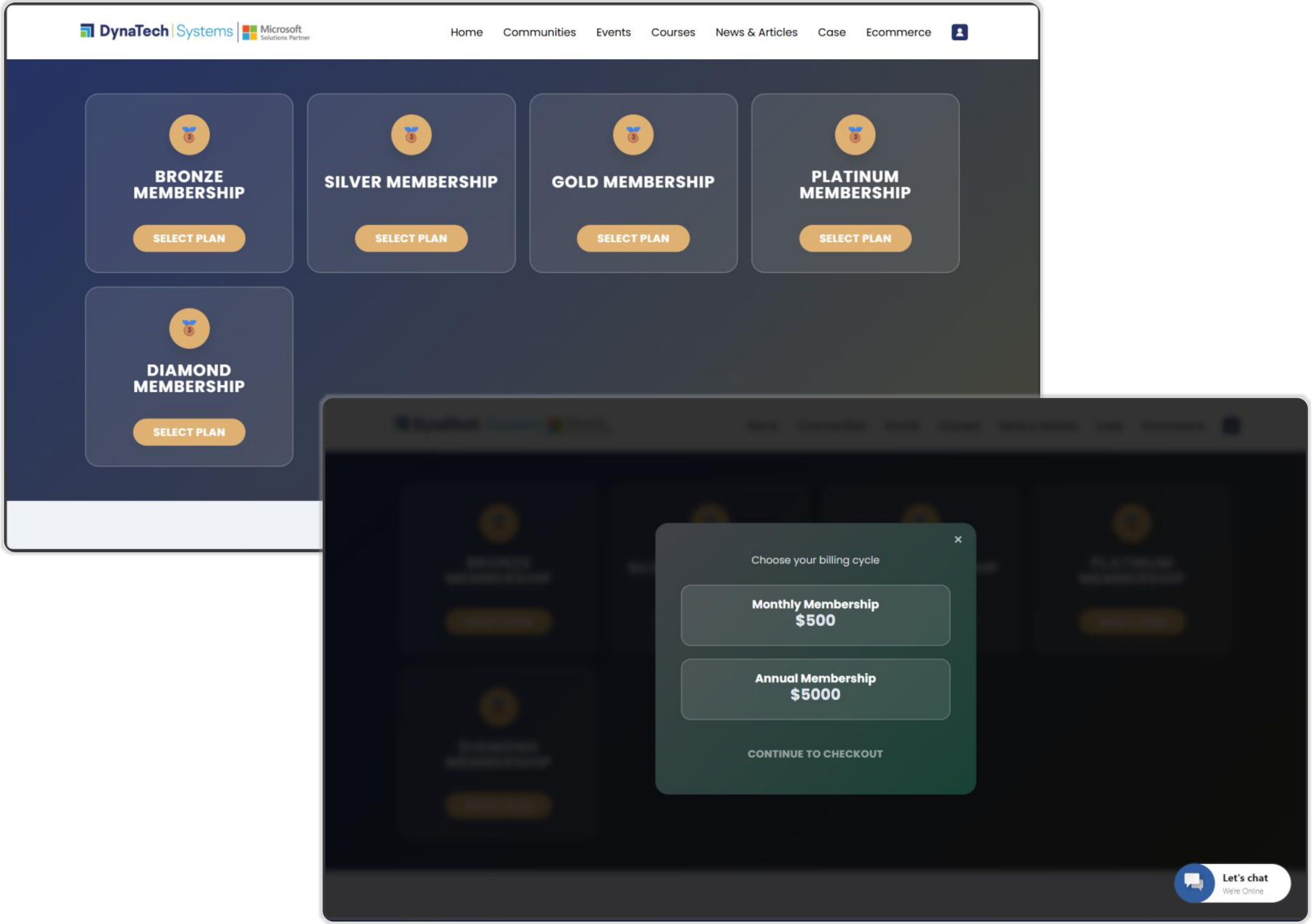
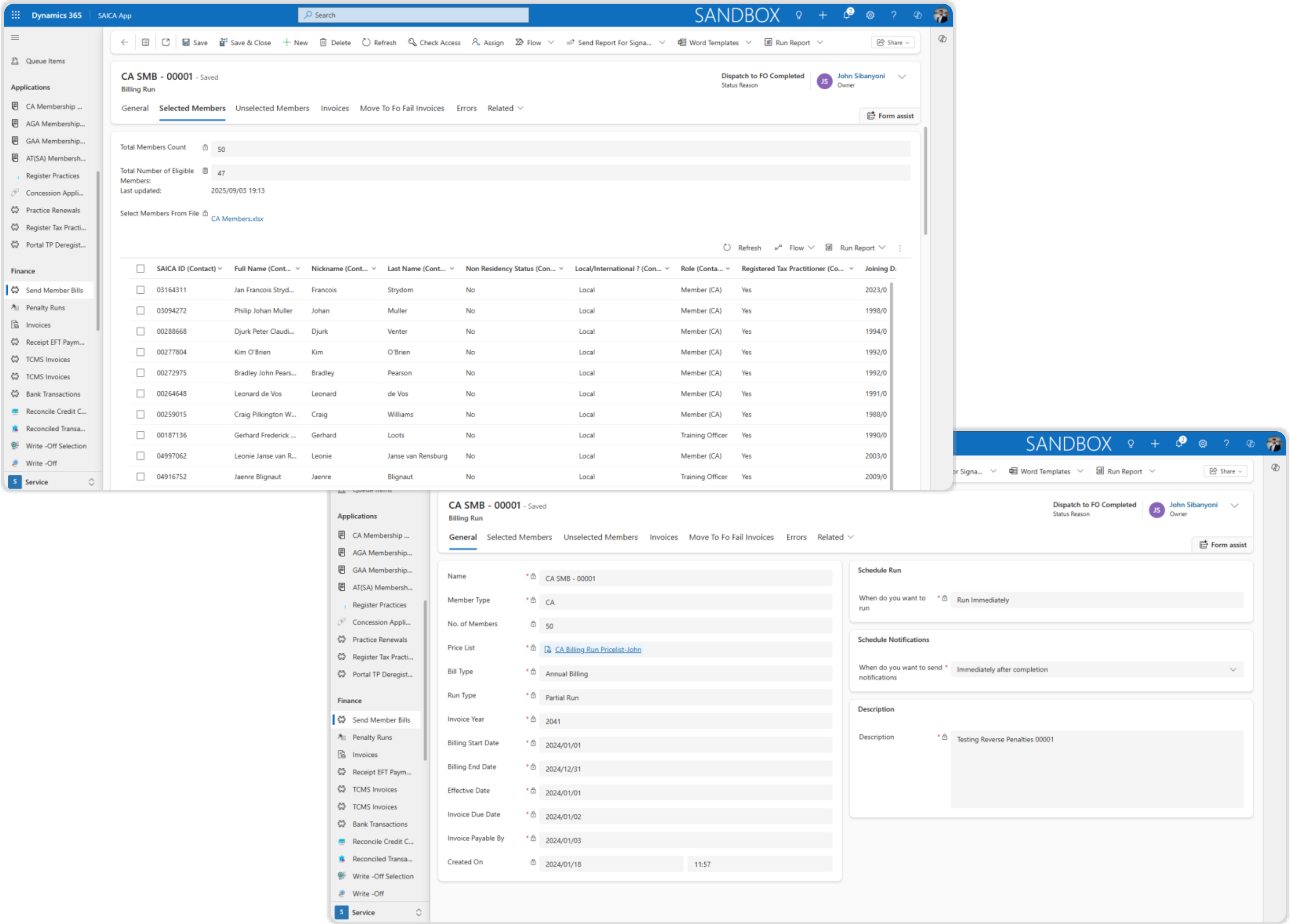
- Online application forms with secure payment integration
- Auto-routing to CRM for review & approval workflows
- Notifications to applicants and admins at each step
- Reduced manual effort with transparent audit trail
- Smooth onboarding with minimal delays



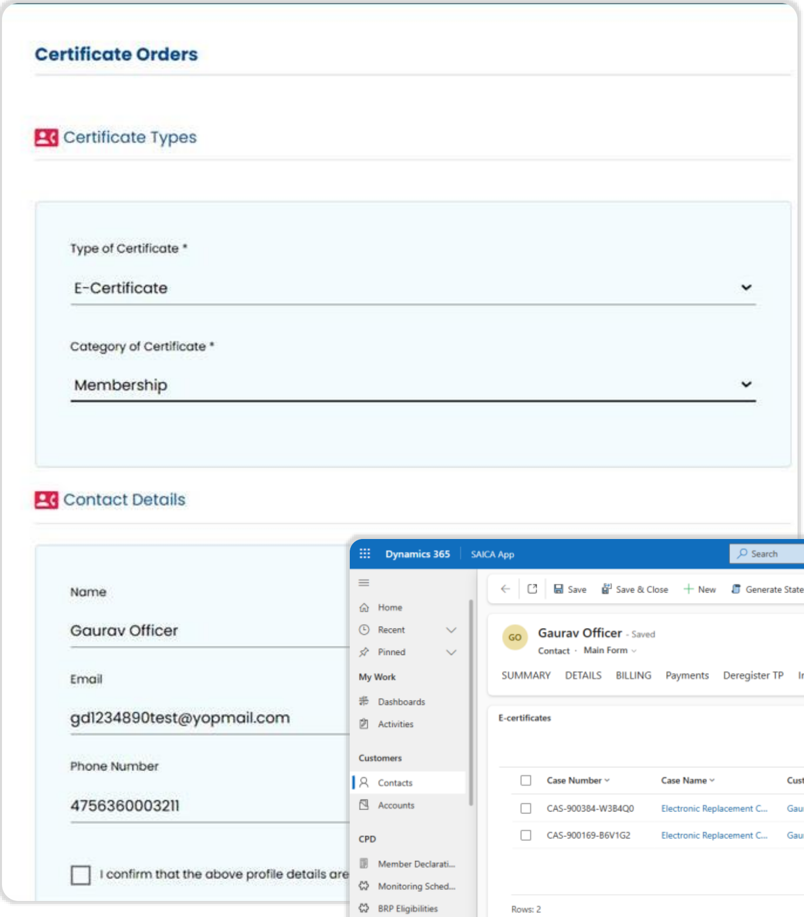
- Multiple types: Individual, Corporate, Student, Lifetime
- Plan options: Monthly, Annual, Lifetime, Custom
- Auto-assignment of entitlements and benefits
- Approval workflows tailored by membership type
- Members can request type/plan changes via portal

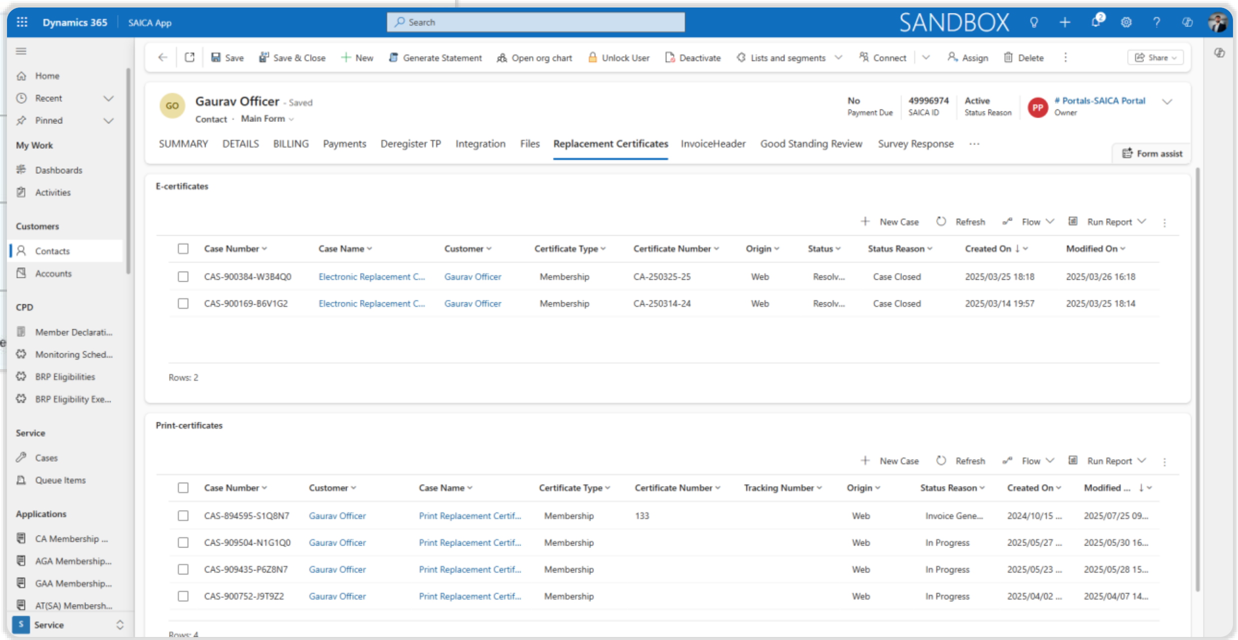




- Automated renewal reminders at configurable intervals
- Auto-billing with stored payment methods
- Automated invoice creation and reconciliation
- Grace period handling with auto-notifications
- Compliance-ready reporting with audit logs

- Auto-generated digital ID cards upon approval
- QR code-enabled for instant verification
- Badges for milestones, achievements, and contributions
- Auto-regeneration upon renewal or profile updates
- Secure storage in CRM and member portal





Member Preferences

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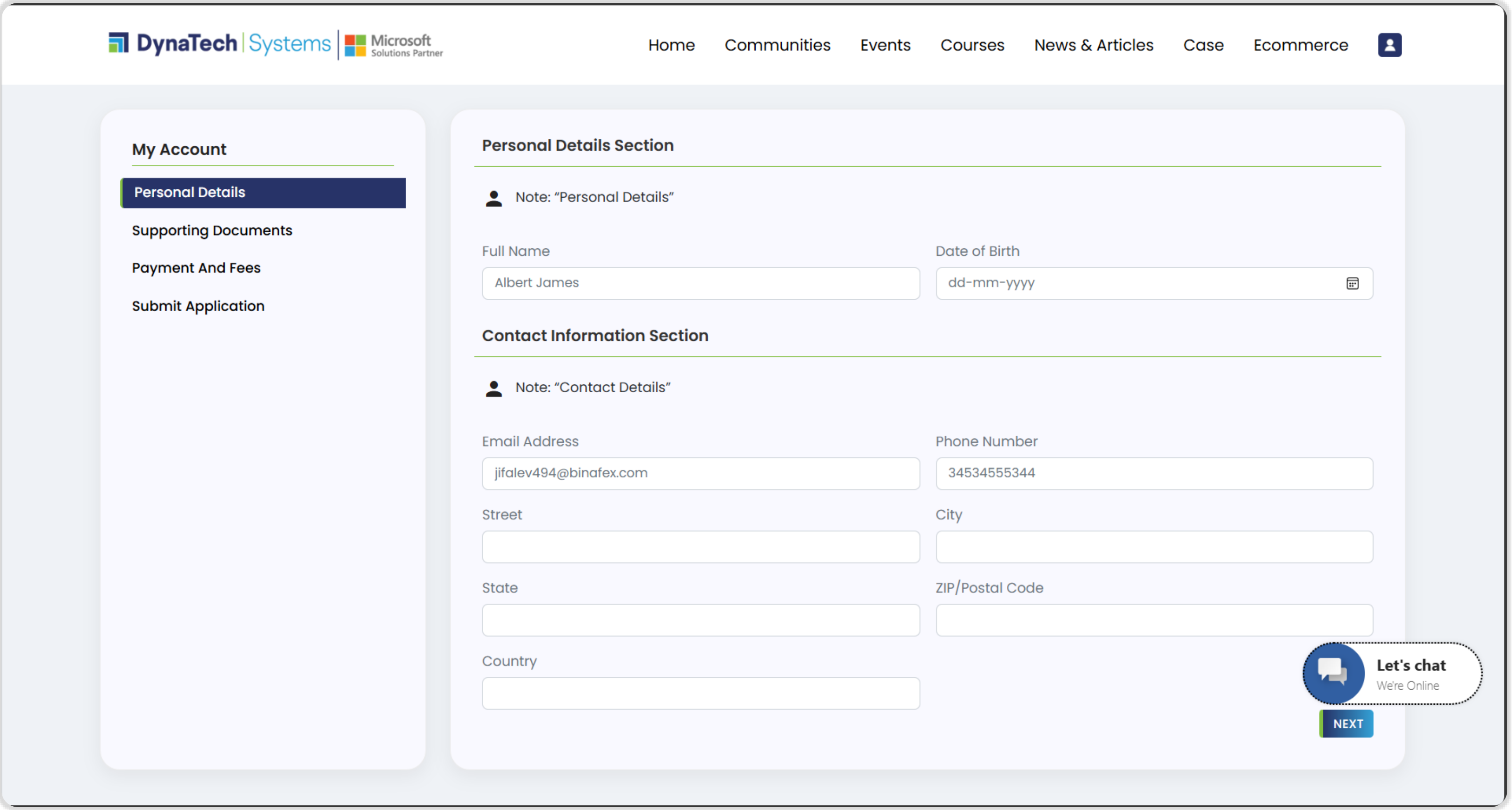
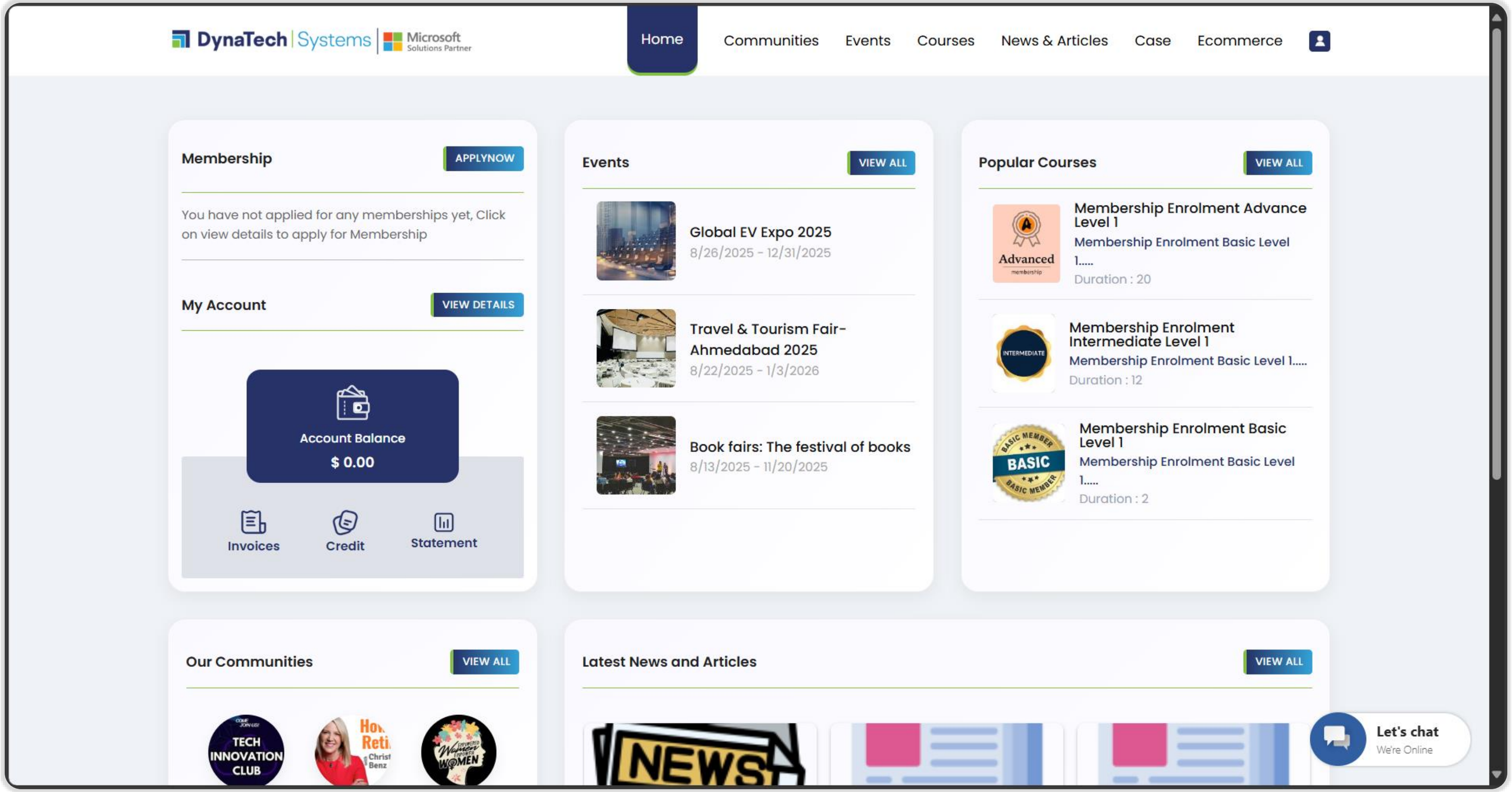
- Members can update profile details anytime
- Configure communication preferences (email, SMS, portal)
- Select interest areas for personalization
- Data syncs real-time with CRM
- Ensures compliance with privacy & consent requirements



- Central hub for renewals, benefits, events, and courses
- Download ID cards, certificates, and achievements
- Access group/committee participation and documents
- Manage support tickets and chatbot interactions
- Seamless experience synced with CRM



1. Automated invoicing and payment reconciliation
2. Support for discounts, refunds, and adjustments
3. Tax compliance and reporting built-in
4. Integration with Dynamics 365 Finance or ERP
5. Financial dashboards for leadership visibility

1. › Engagement scoring based on activities and renewals
2. › Predictive churn analysis for proactive retention
3. › Dashboards for active vs. at-risk members
4. › Referral program insights and growth tracking
5. › Power BI reports for leadership and board reviews

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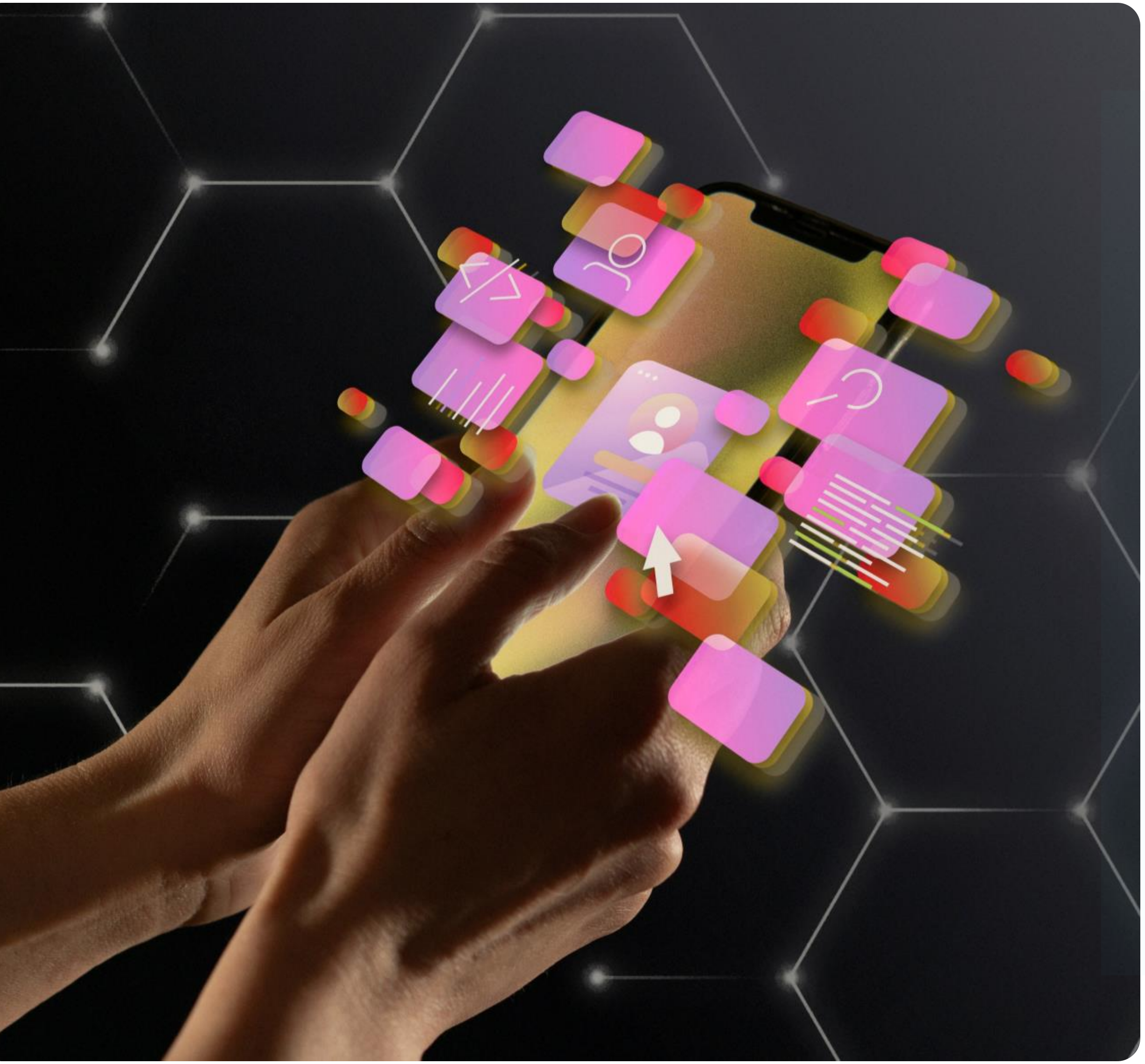
Events and Conferences



End-to-End Event Lifecycle Management

Empower associations to seamlessly plan, deliver, and measure events—onsite, virtual, or hybrid—with integrated registration, payments, sponsorships, and analytics.

Plan, schedule, publish, and manage events.

End-to-End Lifecycle

Organize sessions, tracks, abstracts, and speaker profiles.

Multi-Session & Speakers

Streamlined booking, invoicing, and payment processing.

Registration & Payments

QR-based check-ins, session-level tracking, and CEU assignment.

Check-in & Attendance

Collect participant feedback pre- and post-event.

Surveys & Feedback

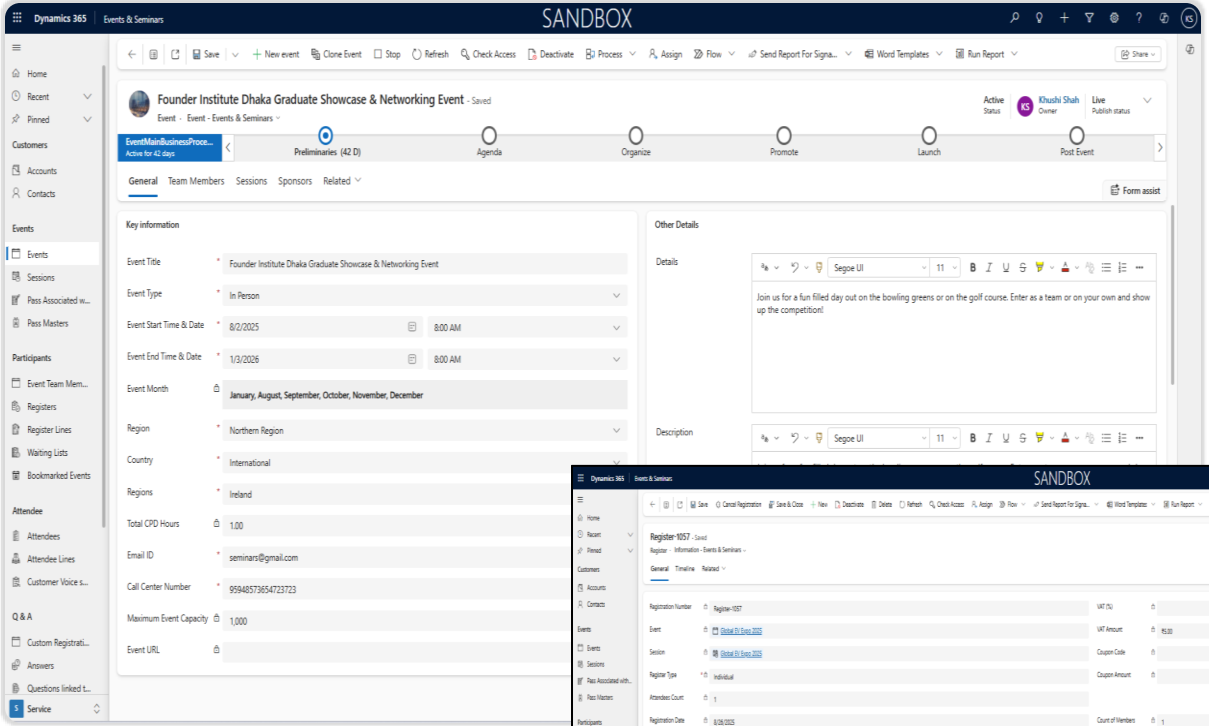
Manage sponsorship tiers, benefits, and visibility.

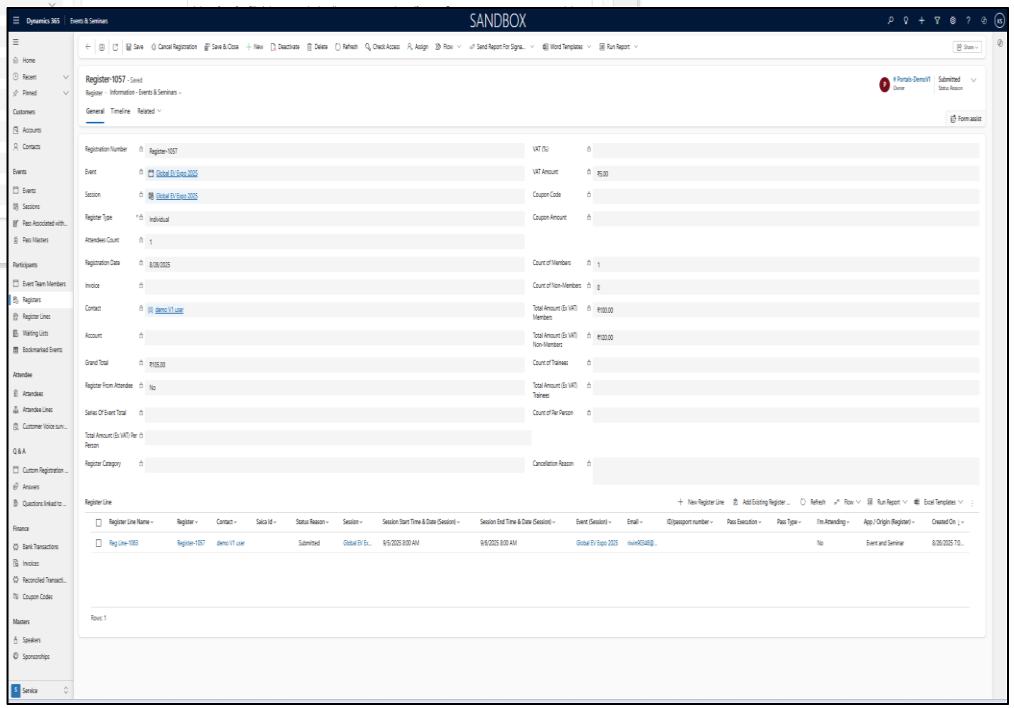
Sponsorship Packages

Track attendance, engagement, ROI, and revenue.

Reporting & Analytics

- Create & schedule events in CRM with metadata and logistics
- Setup includes type, venue/URL, capacity, tracks, speakers
- Draft → Scheduled → Published → Completed → Archived
- Recurrence & cloning for repeat events
- Sync with Outlook/Calendars for reminders

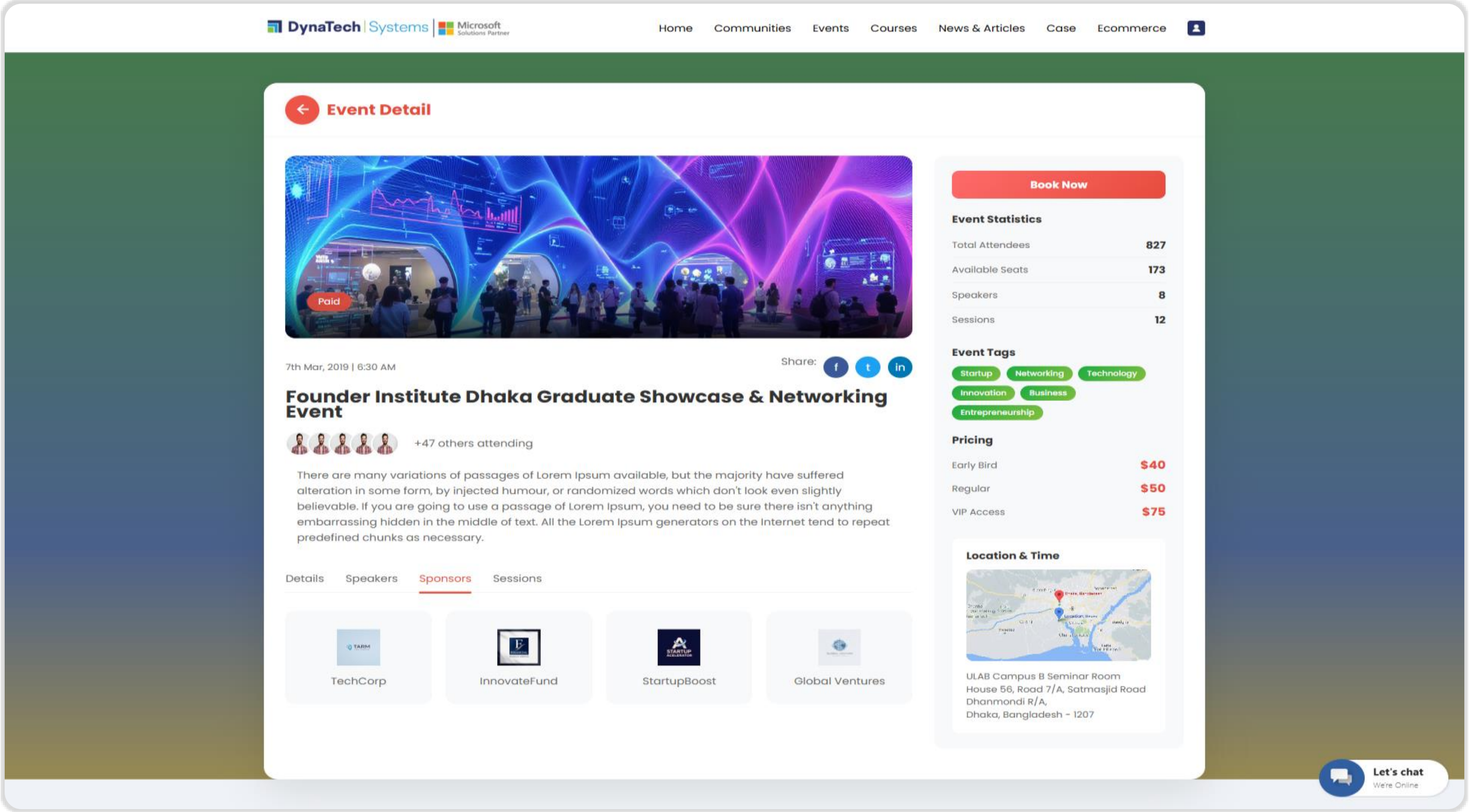




1. Select platform (Zoom/Teams) during event setup
2. API creates meetings/webinars automatically
3. Join links embedded in confirmation emails & portal pages
4. Calendar integration for Outlook/iCal/Google
5. Attendance syncs back to CRM post-event

Event Types – Virtual, Onsite & Hybrid

- Virtual: Auto-generate join links, capacity management
- Onsite: Venue details, seating layouts, room capacities
- Hybrid: Both modes enabled with attendee choice
- Portal dynamically adjusts registration options based on type



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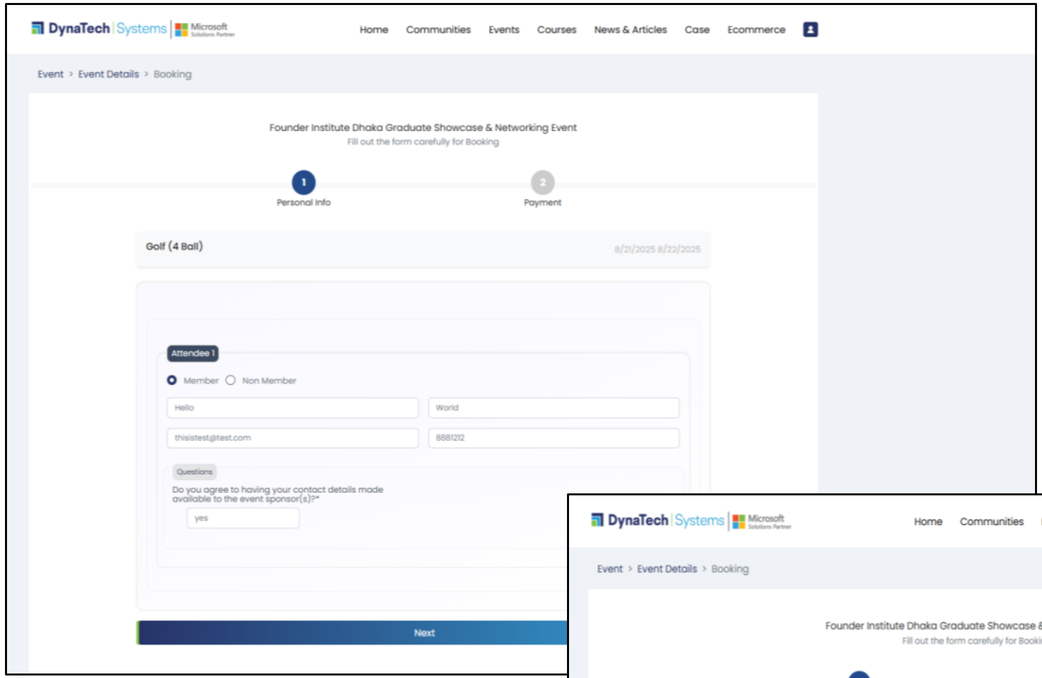
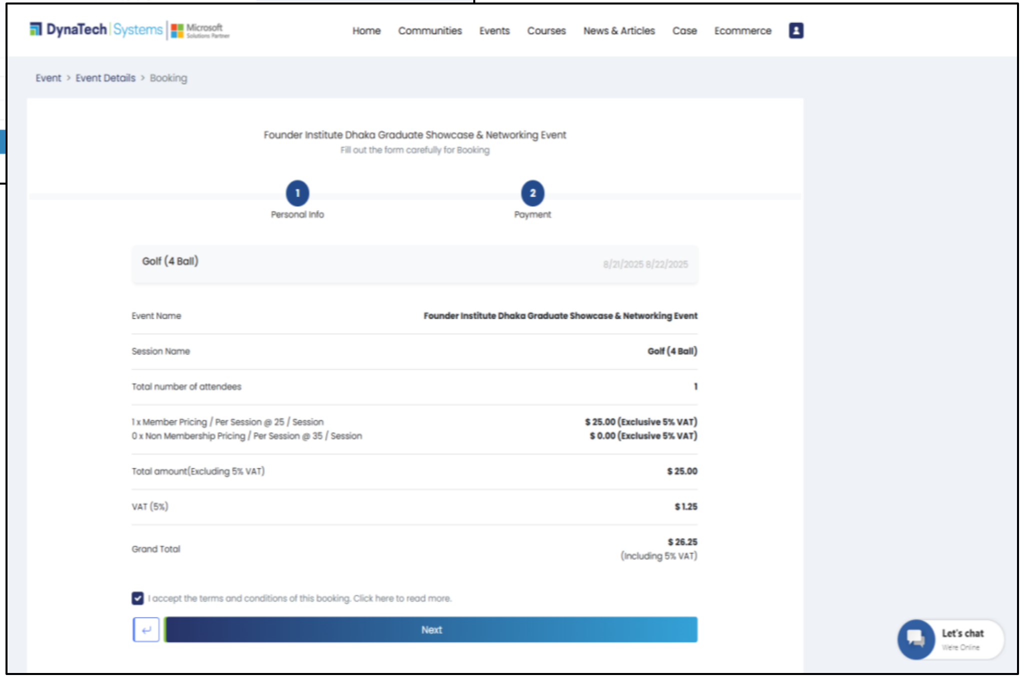
- Portal-based event registration forms
- Capture attendee details, sessions, mode, preferences
- Member vs. non-member pricing logic
- Integrated secure payments & automated invoicing
- My Events section on portal for attendees to manage bookings





1. Create multiple sessions/tracks per event
2. Link speakers to sessions with bios, expertise, photos
3. Public speaker directory on portal with filters
4. Automated comms: confirmations, reminders, instructions
5. Session-specific attendance & feedback tracking

1. › Generate badges with QR codes for each registrant
2. › Badges delivered via email & portal download
3. › Onsite check-in via QR scan (mobile app/kiosk)
4. › Virtual auto check-in via Zoom/Teams login
5. › Real-time CRM updates: Registered → Checked-in

1. › Assign CEUs to sessions/events during setup
2. › Attendance validated via check-in or login logs
3. › CEUs accumulated per member in CRM
4. › Certificates auto-generated when thresholds met
5. › CEU history & certificates visible in member portal

1. Pre-event surveys capture expectations
2. Post-event & session-level feedback forms
3. Distributed via email or portal (Customer Voice)
4. Capture NPS, speaker ratings, content quality
5. Feedback linked to attendee/session for analytics

1. › Define tiered packages (Gold/Silver/Bronze)
2. › Assign benefits: logos, booths, speaking slots
3. › Sponsors apply via portal or added by admins
4. › Invoices generated & benefits tracked in CRM
5. › Sponsor visibility on event pages & apps

1. Dashboards for registrations, attendance, revenue
2. Session & speaker popularity tracking
3. Feedback aggregation & sentiment analysis
4. Segmentation by member type, ticket, event type
5. Benchmarks vs. past events for improvement

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Fundraising & Giving

Modern, Transparent, and Donor-Friendly Giving

Enable associations and nonprofits to maximize donor contributions with targeted campaigns, secure payments, recognition programs, and transparent reporting.

Launch targeted, branded donation campaigns.

Donation Campaigns

Enable one-time, recurring, tribute, or corporate-matching donations.

Secure Donations

Offer installment-based pledges and donation add-ons during checkout.

Pledges & Add-Ons

Assign donor tiers, certificates, and digital badges.

Recognition & Badging

Showcase campaign progress in real time.

Fundraising Thermometers

Track donor lifecycle, retention, and ROI.

Analytics

Send instant thank-you notes, receipts, and donor journeys.

Automated Stewardship

1. Create campaigns with goals, timelines, and budgets
2. Link to branded donation pages, emails, and social pushes
3. Real-time thermometer tracking of campaign progress
4. Monitor donations, average gift size, and channel performance
5. Automated thank-you emails, receipts, and follow-ups

1 › Branded forms in Power Pages with logo & colors

2 › Options: preset/custom amounts, one-time or recurring

3 › Tribute donation checkbox for “In Honor” or “In Memory”

4 › Secure payments (Stripe, Razorpay, etc.)

5 › Real-time CRM sync with donor record creation

6

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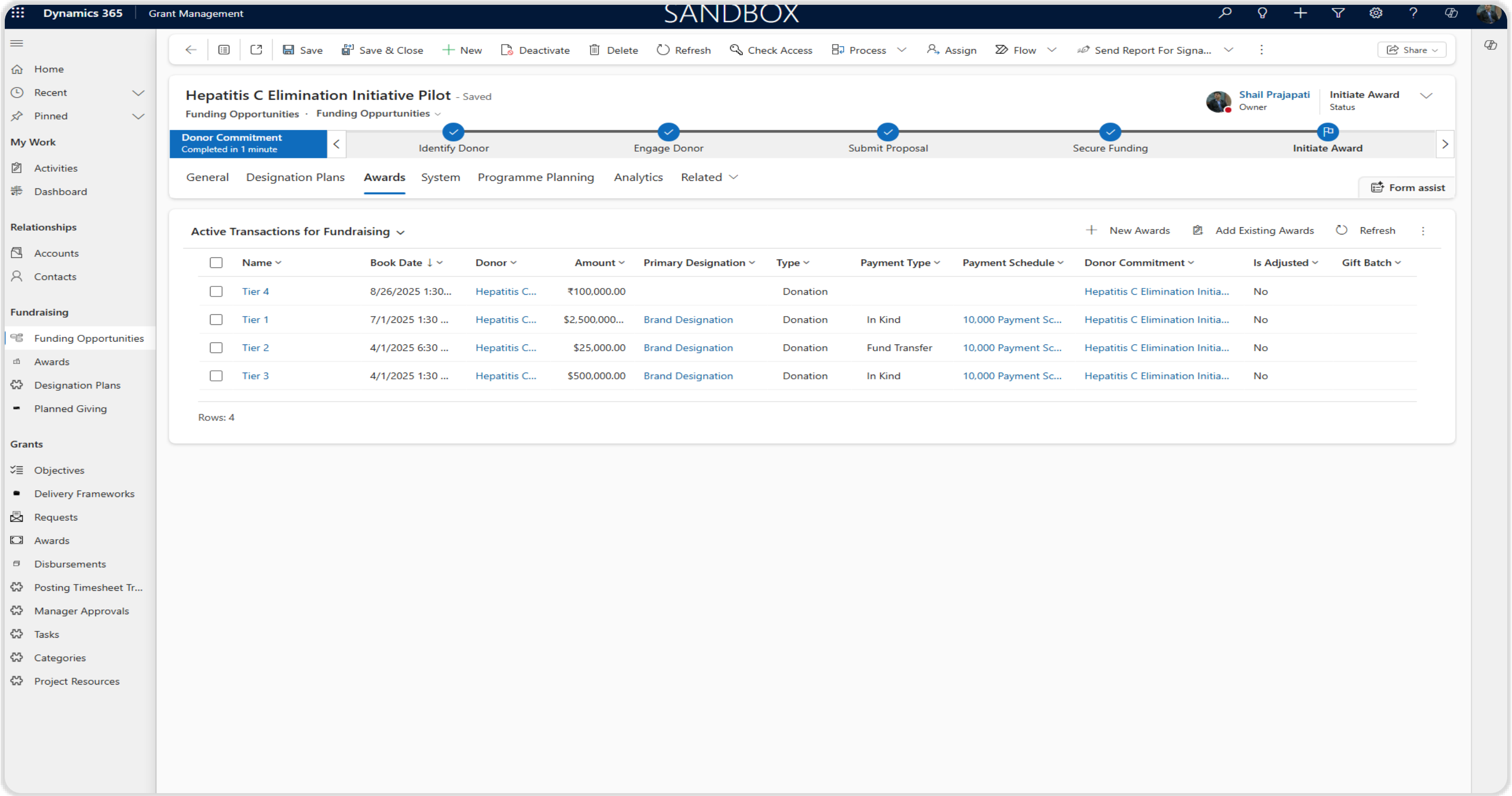
1. Tribute donations with honoree details & notifications
2. Tribute walls for recognition (optional, donor consent)
3. Donors indicate employer matching program
4. CRM tracks match requests and corporate contribution status
5. Dashboards show top matching companies and amounts

- Recognition tiers (Bronze, Silver, Gold) auto-assigned by contribution
- Badges, certificates, and portal visibility for recognition
- Showcase top donors in newsletters, events, and “Wall of Honor”
- Encourage ongoing giving through appreciation campaigns



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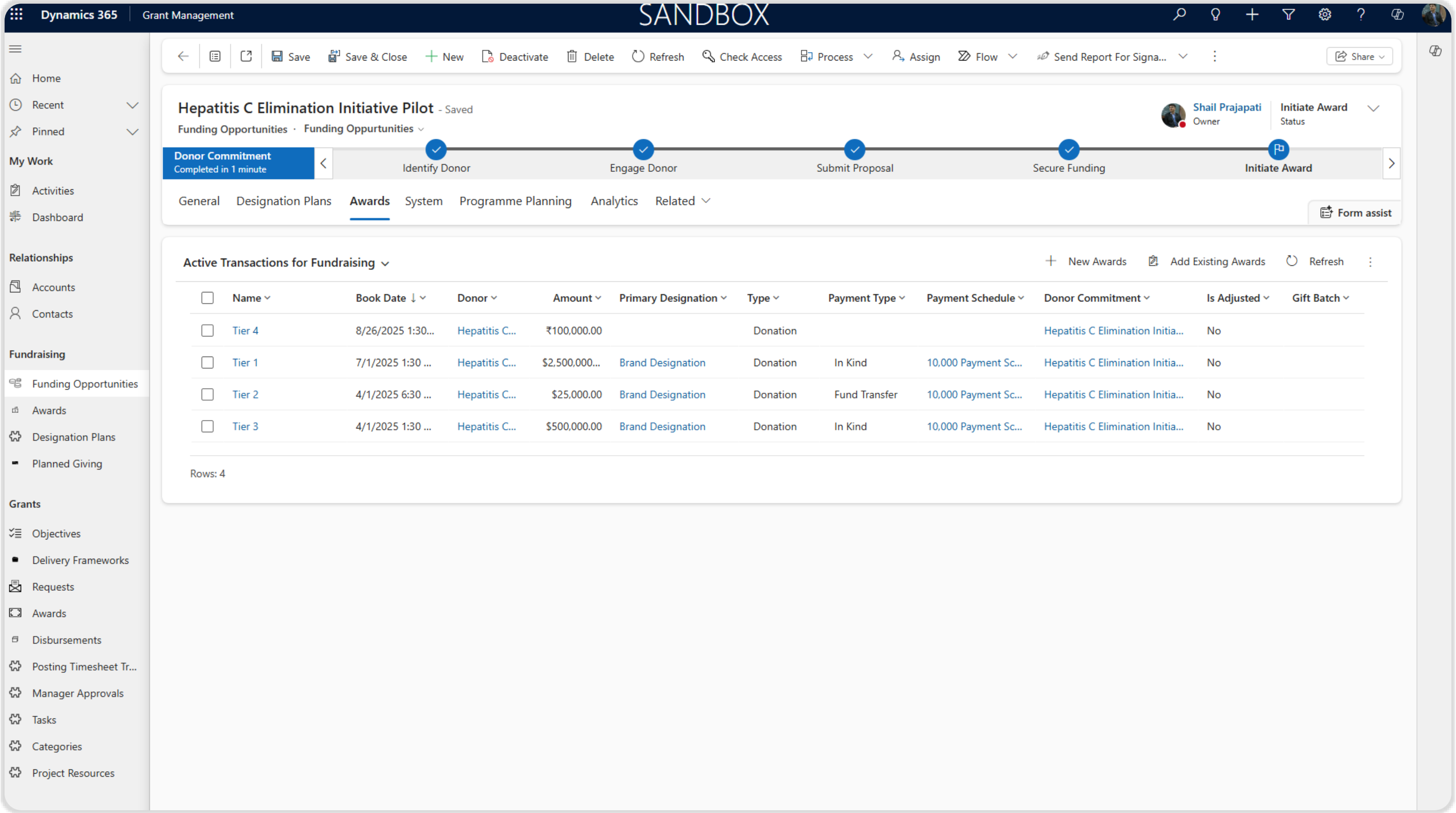
- Donors commit to installment-based contributions
- CRM creates pledge record with frequency, timeline, and status
- Auto-generate payment reminders and thank-you messages
- Portal shows pledge progress and payment options
- Dashboards compare pledged vs. collected amounts



1. › Sync donation transactions with Dynamics 365 Finance & Operations
2. › FO journals, ledgers, and reconciliations auto-created
3. › Return statuses: Synced, Failed, Reconciled
4. › Audit-ready storage of receipts and classification of donations
5. › Tax-deductible and restricted funds tracked in Finance

1

› Personalized thank-you emails with donor name & campaign info

2

› Branded receipts generated automatically and attached to emails

3

› Stored centrally in CRM for audit and donor requests

4

› Tier-based personalization of messages and certificates

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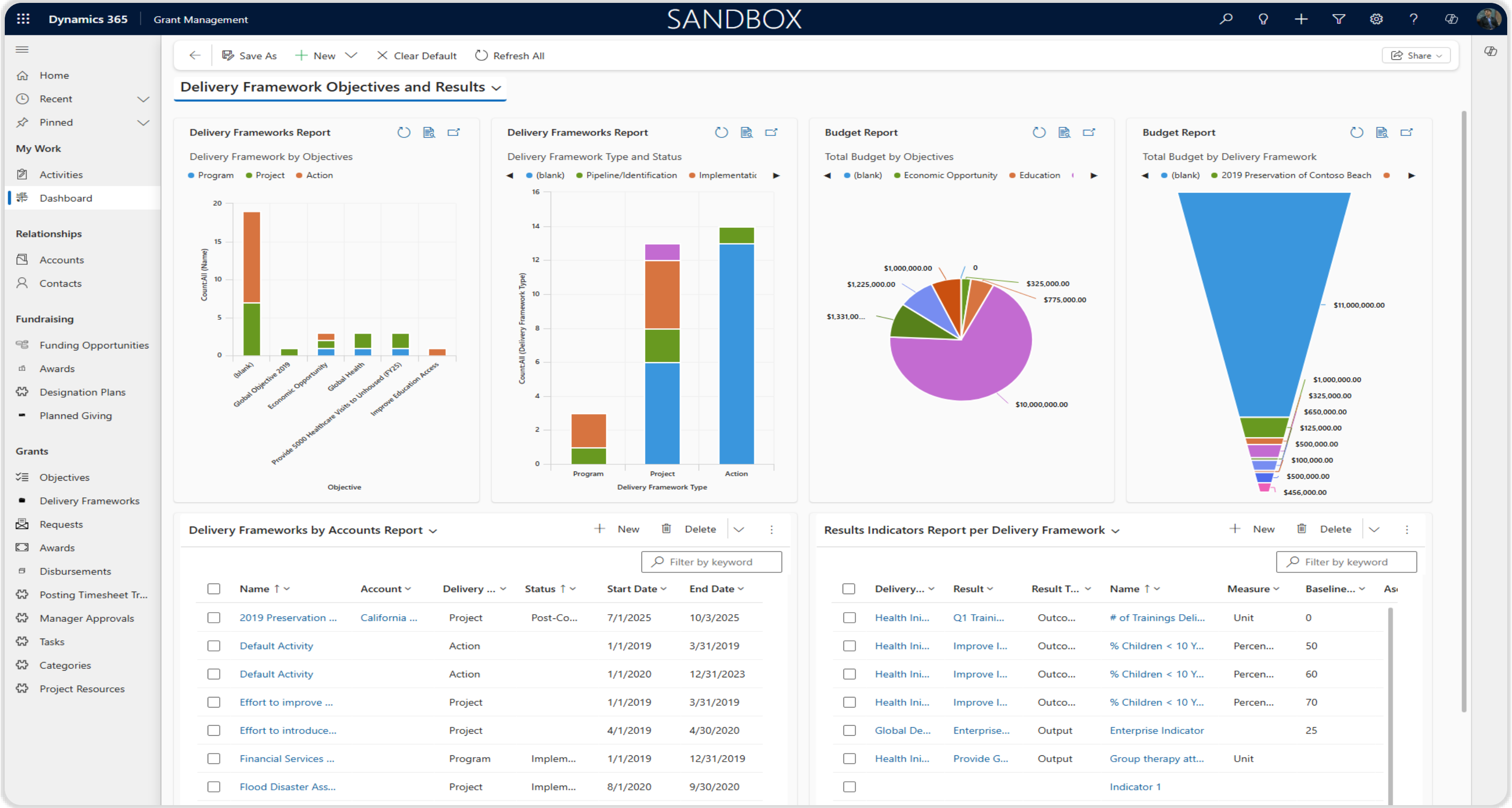
- Power BI dashboards: donations vs. goals, campaign ROI, donor trends
- Drill down by donor type, campaign, or channel
- Track donor lifecycle: retention, acquisition, lifetime value
- Segment: recurring, lapsed, or high-value donors
- Alerts for at-risk donors and re-engagement campaigns



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- Maintain detailed donor profiles in CRM
- Automate communication journeys: welcome, anniversaries, milestones
- Assign high-value donors to relationship managers
- Track all interactions in CRM timeline
- Monitor impact of stewardship on donor retention

Healcrest Charity

Baltimore, MD
21201 | inquire@healcrest.mail | template.net | 222 555 777

Fundraising Letter

October 16, 2050
Jackie Tillman
TitanTale
St. Paul, MN 55101
jackie@you.mail

Dear **Jackie Tillman**,

I hope this letter finds you in good spirits. I am writing to share our mission at **[Your Company Name]** and invite you to be a crucial part of our upcoming fundraising initiative. As you may know, our organization has been dedicated to making a positive impact in the community by providing accessible health and wellness programs.

However, to continue this vital work, we need the support of compassionate individuals and organizations like yours.

Your generosity can help us reach our goals and make a significant difference in the lives of those we serve. We are aiming to raise **$50,000** by **December 31, 2050**, and every contribution counts, no matter the size.

In recognition of your support, we would be thrilled to showcase your involvement through various channels, ensuring that your commitment to our cause is highlighted in the community.

Thank you for considering this opportunity to partner with us to create a brighter future. If you have any questions or would like to discuss this further, please do not hesitate to contact me. Together, we can achieve incredible things.

Warm regards,

[Your Name]
Executive Director
[Your Company Name]

Letter Templates @ Template.net

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Marketing & Engagement

Engage Members with Personalized, Multi-Channel Communications

Enable associations to deliver relevant content, nurture relationships, and drive engagement through automated, data-driven campaigns.

Reach members via Email, SMS, WhatsApp, and Push Notifications.

Multi-Channel Campaigns

Build smart segments based on member profile, behavior, and engagement.

Dynamic Segmentation

Automate campaigns for renewals, events, onboarding, and re-engagement.

Automation & Journeys

Publish structured content and updates through the member portal.

News & Articles

Collect actionable feedback and measure sentiment.

Surveys & Polls

Use branded templates and test variations to optimize performance.

Templates & A/B Testing

Track activity, assign scores, and identify highly engaged members.

Lead & Engagement Scoring

Monitor campaign performance, ROI, and member engagement.

Analytics

Multi-Channel Campaigns

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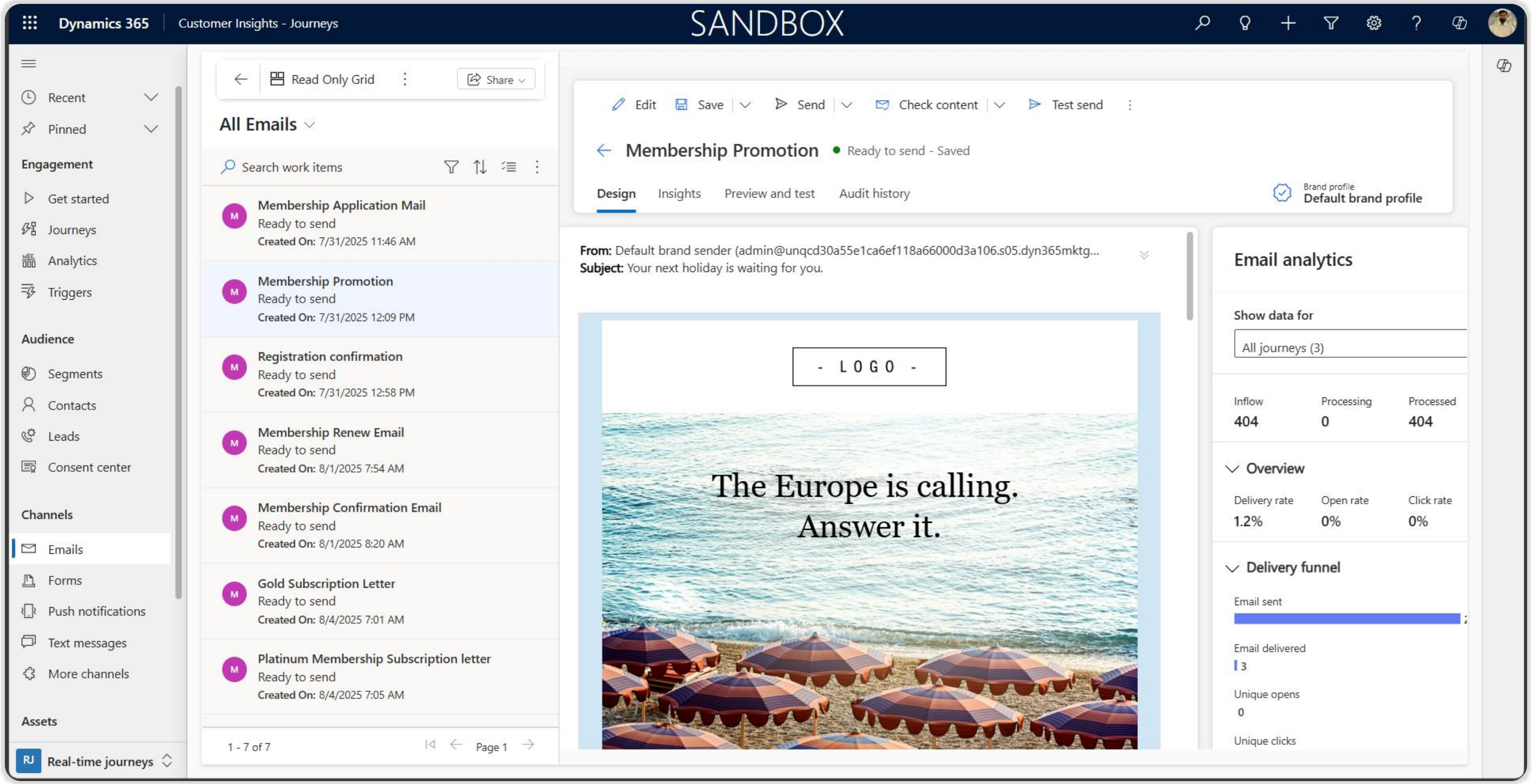
- Launch campaigns via Email, SMS, WhatsApp, and Push Notifications from one system.
- Use drag-and-drop editors with branded templates and personalization tokens.
- Ensure compliance with member preferences, opt-outs, and GDPR/consent settings.
- Monitor delivery, open, click, bounce, and unsubscribe rates in real time.
- Trigger follow-up actions such as nurture journeys, reminders, or support tickets.



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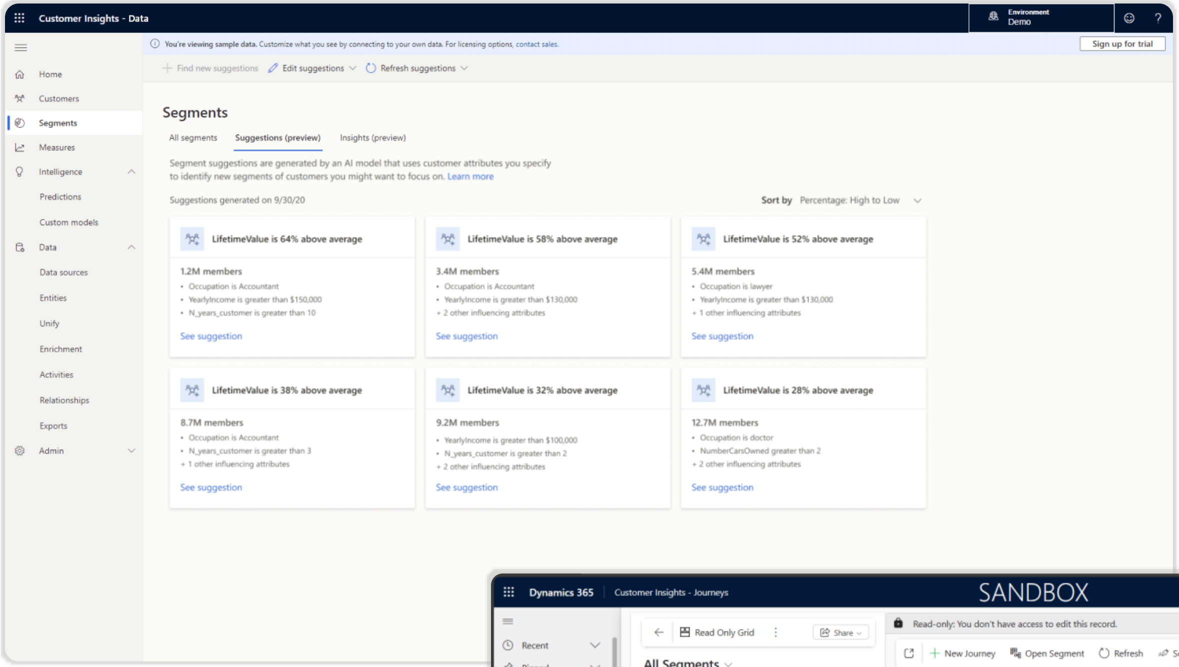
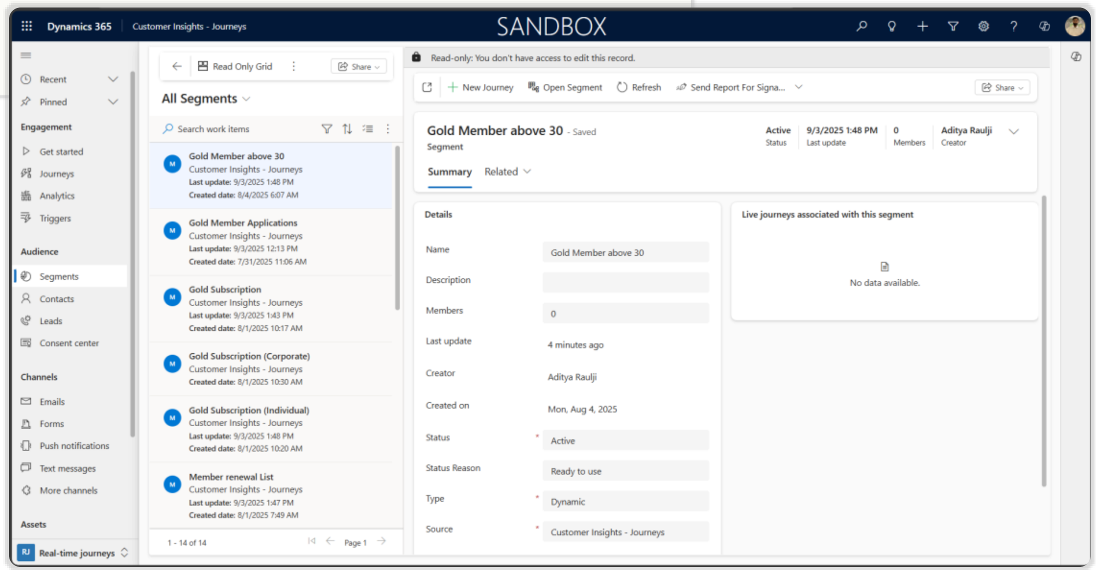
- Create static lists or dynamic rule-based segments using CRM data.
- Filter members by demographics, membership type, location, CEUs, event history, and engagement.
- Use AND/OR logic to refine targeting and build micro-segments.
- Segments refresh automatically to always include the latest qualified contacts.
- Compare segment performance across campaigns and refine rules for better ROI.





1
› Configure drip campaigns for onboarding, renewals, event follow-ups, or re-engagement.

2
› Support multi-channel journeys: email, SMS, WhatsApp, push notifications, and tasks.

3
› Personalize each step using profile attributes like name, membership status, or preferences.

4
› Branching logic ensures different paths based on user actions (opened, clicked, ignored).

5
› Automate renewal notices, welcome series, or reactivation campaigns without manual effort.

1. › Promote upcoming events to targeted segments (by chapter, type, or past participation).
2. › Build multi-wave promotion strategies: early invites, reminders, and last-chance alerts.
3. › Personalize messages with event details like title, date/time, speaker, and session highlights.
4. › Automate registration reminders for members who haven't completed sign-up.
5. › Track campaign performance in real time across channels and optimize messaging.

1. Create branded surveys with multiple question types to collect member feedback.
2. Distribute via email campaigns, SMS/WhatsApp links, or embedded in portal pages.
3. Build quick polls into newsletters or dashboards for fast interaction.
4. Responses are automatically stored against member records in CRM.
5. Analyze satisfaction, sentiment, and trends over time with dashboards.

1. › Centralized library of reusable branded templates for campaigns, events, and newsletters.
2. › Apply consistent organization branding: colors, fonts, logos, footers, and disclaimers.
3. › Run A/B tests for subject lines, content blocks, or delivery times.
4. › System monitors results and automatically deploys the winning version.
5. › Archive or update outdated templates to maintain compliance and relevancy.

1
- Real-time dashboards visualize performance across campaigns, segments, and channels.

2
- Drill into metrics such as open rates, registrations, conversions, and ROI.

3
- Compare campaign effectiveness across member groups or communication methods.

4
- Track donor/member lifecycle, retention rate, and lifetime value.

5
- Track trends with dashboards to identify highly engaged vs. at-risk members.

1. › Real-time dashboards visualize performance across campaigns, segments, and channels.

2. › Drill into metrics such as open rates, registrations, conversions, and ROI.

3. › Compare campaign effectiveness across member groups or communication methods.

4. › Track donor/member lifecycle, retention rate, and lifetime value.

5. › Export insights for leadership presentations, board meetings, and annual reports.

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Digital Commerce & Revenue

Enable Seamless Digital Commerce for Members

Provide associations with a modern eCommerce storefront to sell memberships, courses, merchandise, and more, integrated directly with Dynamics 365.

01

Storefront Integration

Branded Power Pages store to sell products, memberships, and events.

02

Cart & Checkout

Streamlined checkout with discounts, promotions, and coupons.

03

Inventory & Fulfillment

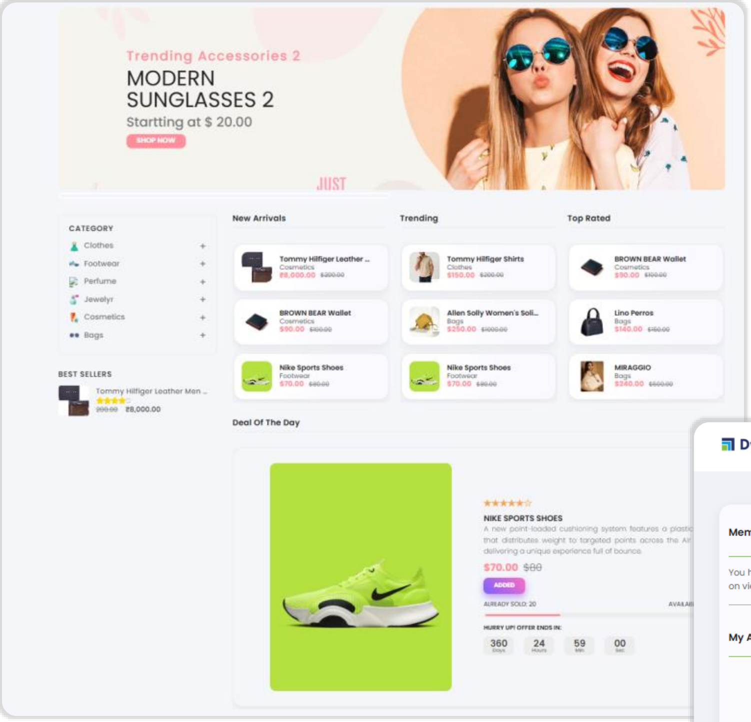
Real-time stock visibility and shipping management.

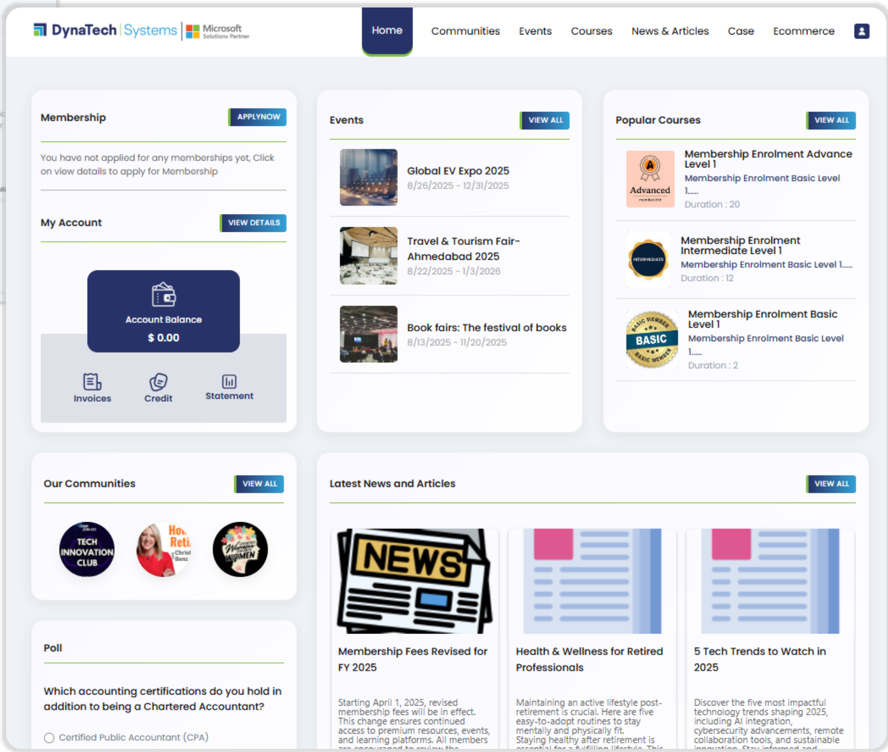
04

Reviews & Recommendations

Member-driven ratings with AI-powered product suggestions.

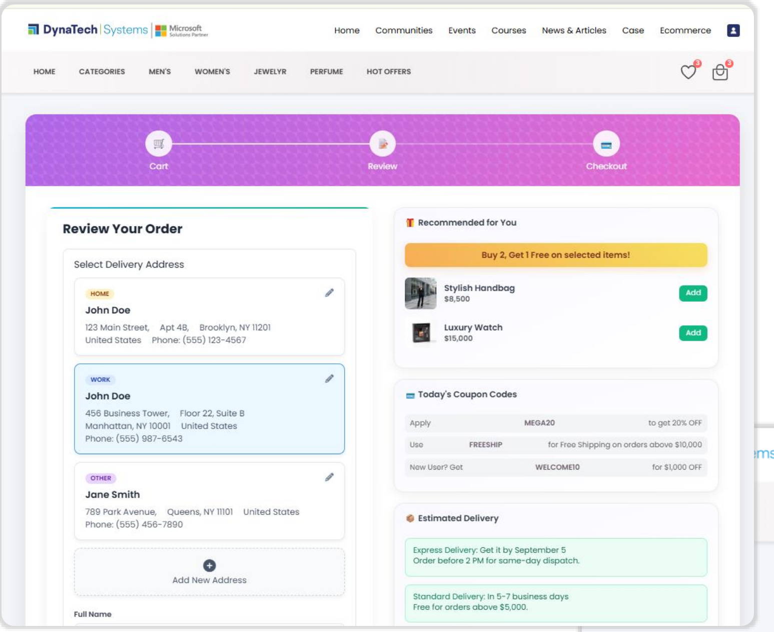
- Branded Power Pages storefront for a consistent member shopping experience.
- Browse products, courses, memberships, and donation options in one place.
- CRM Product Catalog syncs details (name, price, inventory, visibility).
- Dynamic portal display with search, filter, and category navigation.
- Product detail pages with images, videos, related items, and “Add to Cart.”

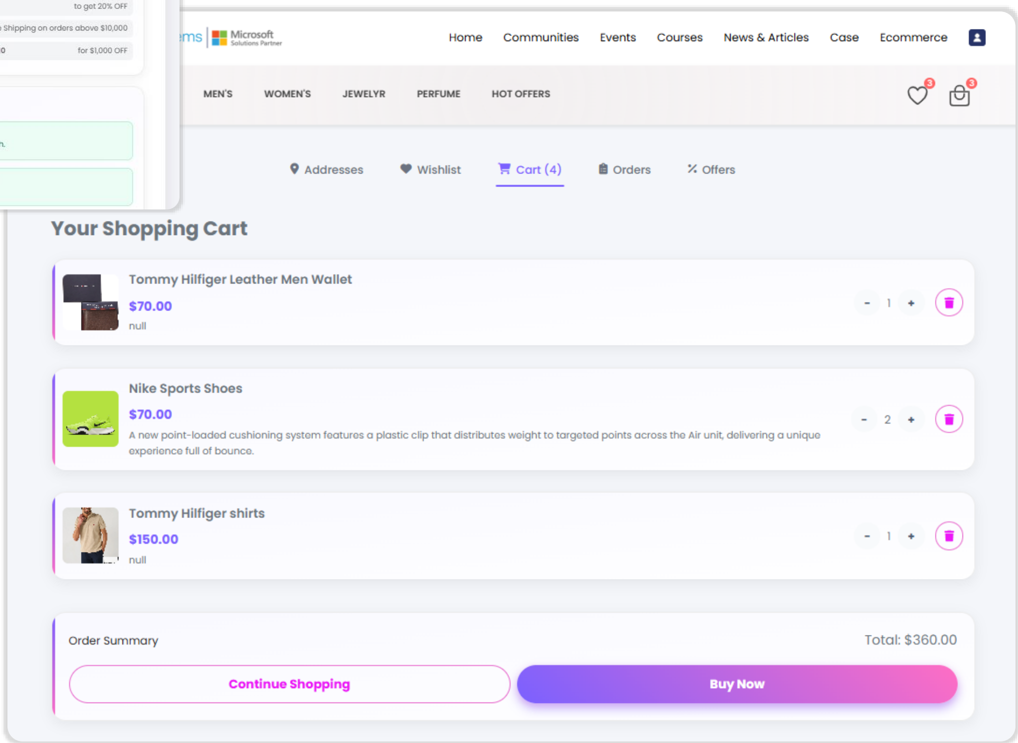




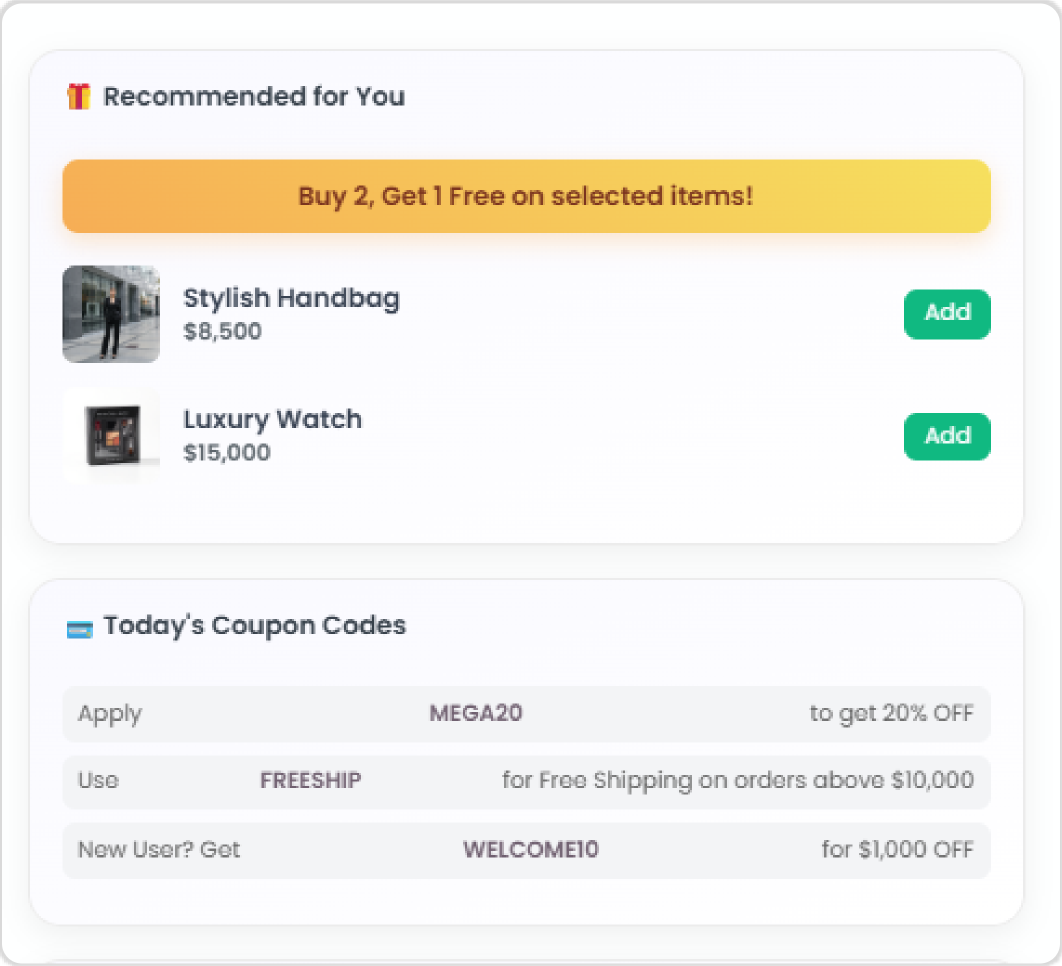
1. Admin manages listings in CRM with stock, pricing, and visibility rules.
2. Draft vs. Published states for controlled rollouts.
3. Member-only pricing and exclusive product visibility supported.
4. Categories, tags, and images ensure easy discovery in portal.
5. Automatic sync to storefront ensures real-time updates.

- Add multiple items (products, memberships, courses) to cart in one click.
- Cart shows live item count, subtotal, and applied discounts.
- Update quantity, remove items, or apply coupons directly.
- Secure checkout with auto-filled data for logged-in members.
- Support for guest checkout, donation add-ons, and multiple payment gateways.
- Post-purchase confirmation with receipt, invoice, and download/shipping info.

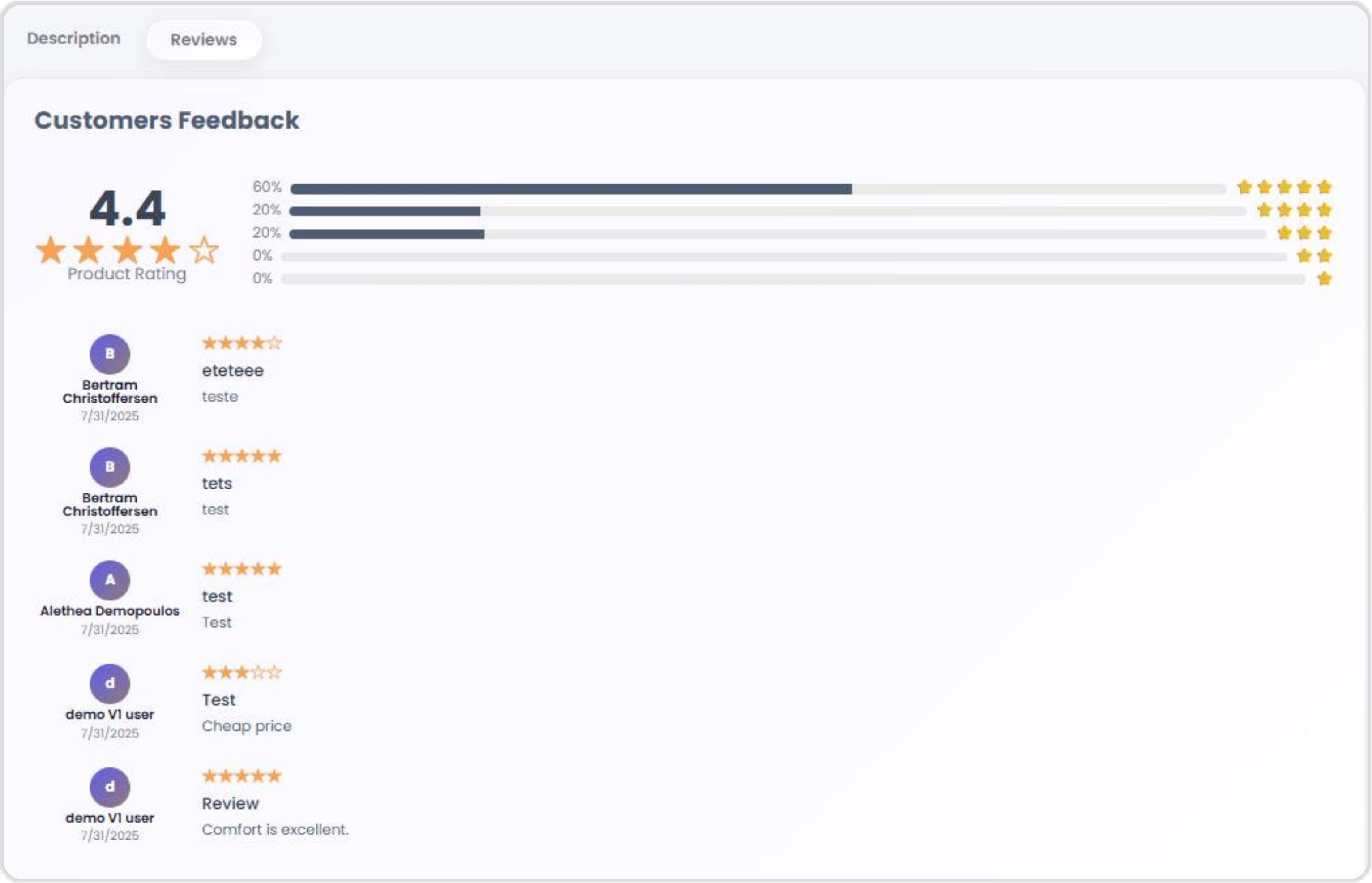




- Create percentage, flat-rate, or “Buy X Get Y” campaigns in CRM.
- Set rules by validity dates, usage limits, products, or member eligibility.
- Customers apply codes during checkout, system validates instantly.
- Real-time recalculation of totals with discounts applied.
- Track redemption rates, top-performing codes, and promotion ROI in CRM/Power BI.



- Customers leave ratings and reviews post-purchase via portal.
- Reviews include star rating, text feedback, and optional images.
- Moderation workflow ensures quality and blocks spam.
- Product pages display average ratings and allow filtering.
- CRM dashboards track sentiment, satisfaction trends, and flagged issues.
- Feedback used to improve offerings and promote top-rated products.



1

› AI/Rule-based logic suggests items based on browsing, purchases, and membership.

2

› Displayed in “You May Also Like” sections on product, cart, or portal dashboard.

3

› Related products shown during checkout and post-purchase.

4

› Always filters out unavailable or restricted items.

5

› CRM tracks CTR, conversion rate, and upsell success to refine logic.

1. › Real-time inventory synced with CRM or ERP (e.g., D365 FO).
2. › Stock labels show In Stock, Low Stock, or Out of Stock dynamically.
3. › Quantity selector restricted to available units to prevent overselling.
4. › On checkout, stock deducted automatically and synced back to CRM/ERP.
5. › Dashboards track fast-moving products and low-stock alerts.
6. › Auto-generate restock POs or internal requests; sync with warehouse logistics.

1. › Order lifecycle tracked: Processing → Packed → Shipped → Delivered.
2. › Courier/3PL integration (e.g., FedEx, DHL) for tracking number sync.
3. › Email + portal updates keep customers informed in real time.
4. › “My Orders” section in portal shows current status and history.
5. › CRM workflows trigger alerts for delays and auto-close delivered orders.

1. › Tax rules configured in CRM or via tax engine (Avalara, TaxJar).
2. › Auto-calculation during checkout based on address, product type, and jurisdiction.
3. › Cart summary shows clear line-item and total tax breakdown.
4. › Tax data stored with each order and synced with D365 FO.
5. › Reports support multi-region compliance, exemptions, and filing exports.
6. › Ensures financial transparency and audit readiness.

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Learning & Credentialing

Empower Lifelong Learning and Credentialing

Provide associations with end-to-end certification and education capabilities—from exam delivery to CEU/CPD tracking—while offering members personalized learning pathways.

End-to-end credentialing management with eligibility, renewals, and tracking.

Certification Programs

Manage professional exams including scheduling, eligibility, results, and publishing.

Exam & Assessment Automation

Provide guided career or competency-based learning journeys.

Courses & Learning Pathways

Secure and automated assessments with real-time validation.

Online Testing

Issue verifiable digital credentials and certificates.

Badges & Certificates

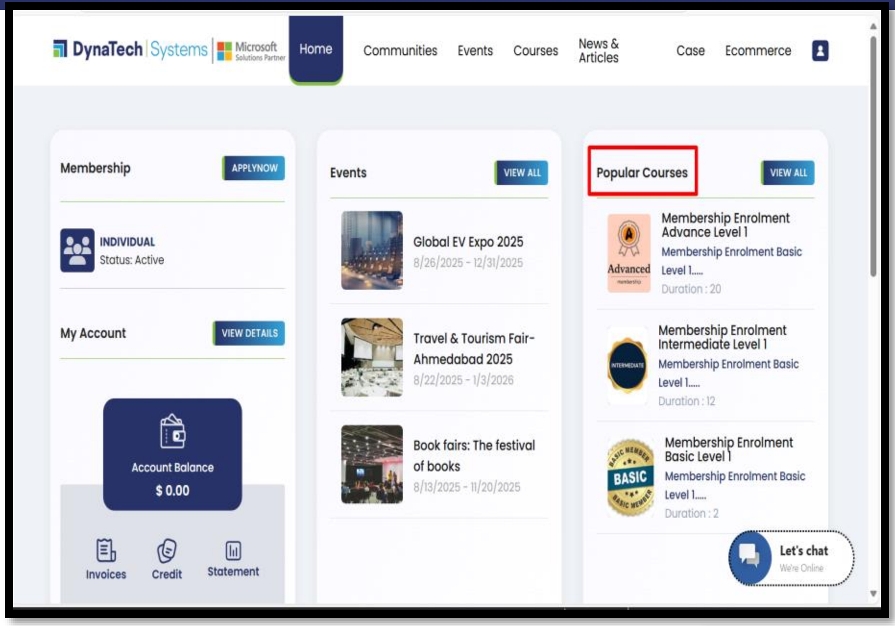
Integrate seamlessly with LMS platforms for learning delivery.

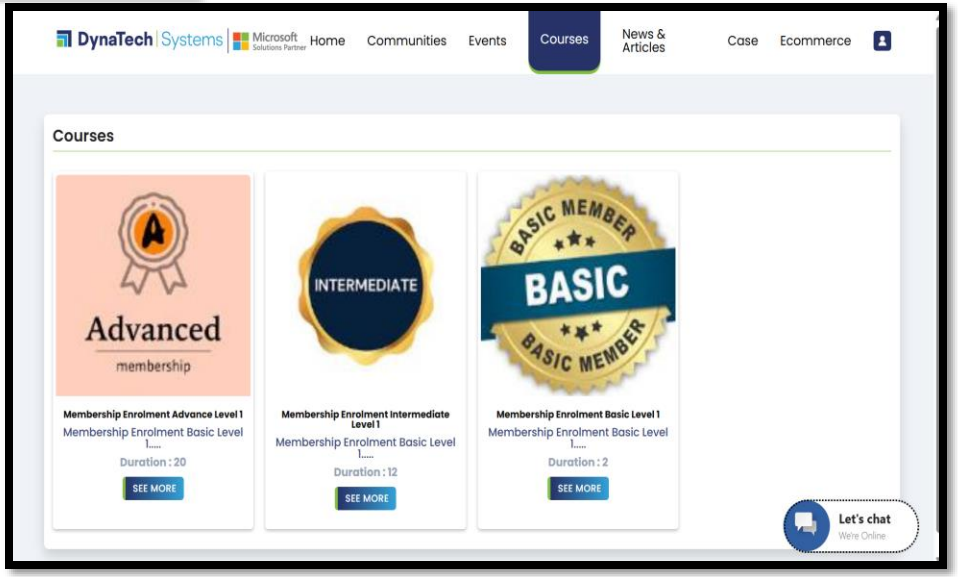
LMS Integration

Monitor completion rates, trends, learner progress, and renewal cycles.

Analytics

- Members can browse available certifications by category, level, or domain.
- Detail pages show syllabus, eligibility, pricing, CEUs, and instructors.
- Enroll directly or via application workflow with payment integration.
- CRM tracks status: Applied → Approved → Enrolled → Completed → Certified.
- Admin manages program setup, prerequisites, renewals, and performance tracking.





Course & Learning Pathways

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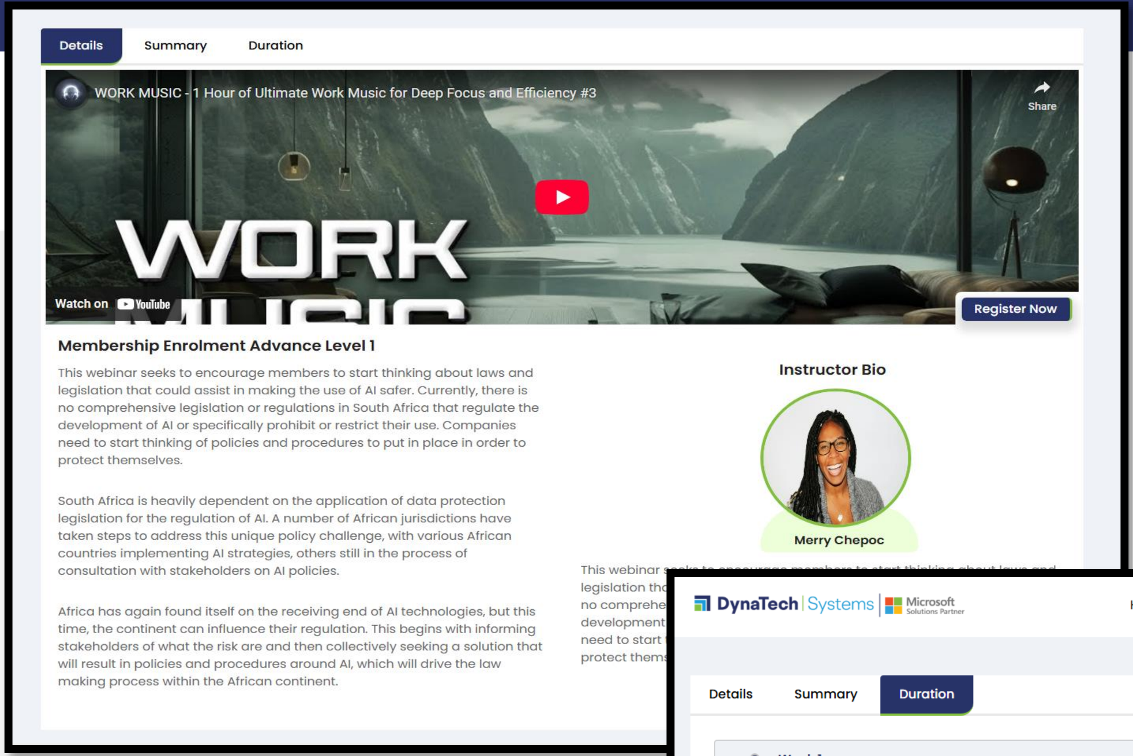
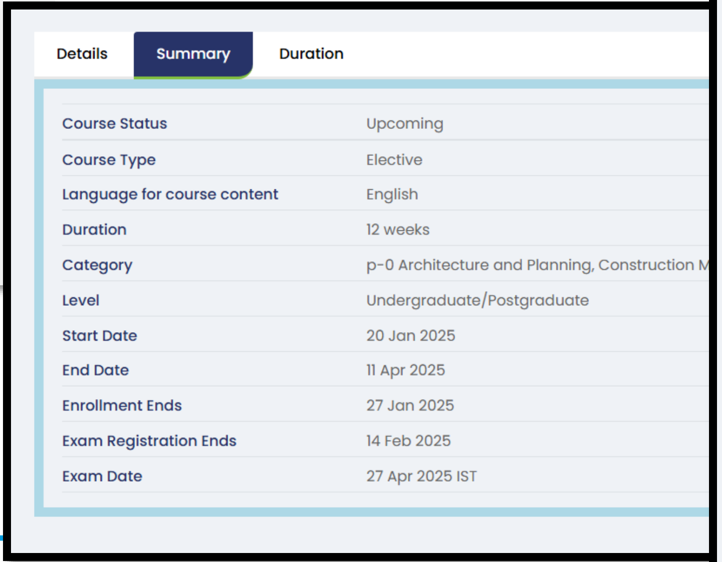
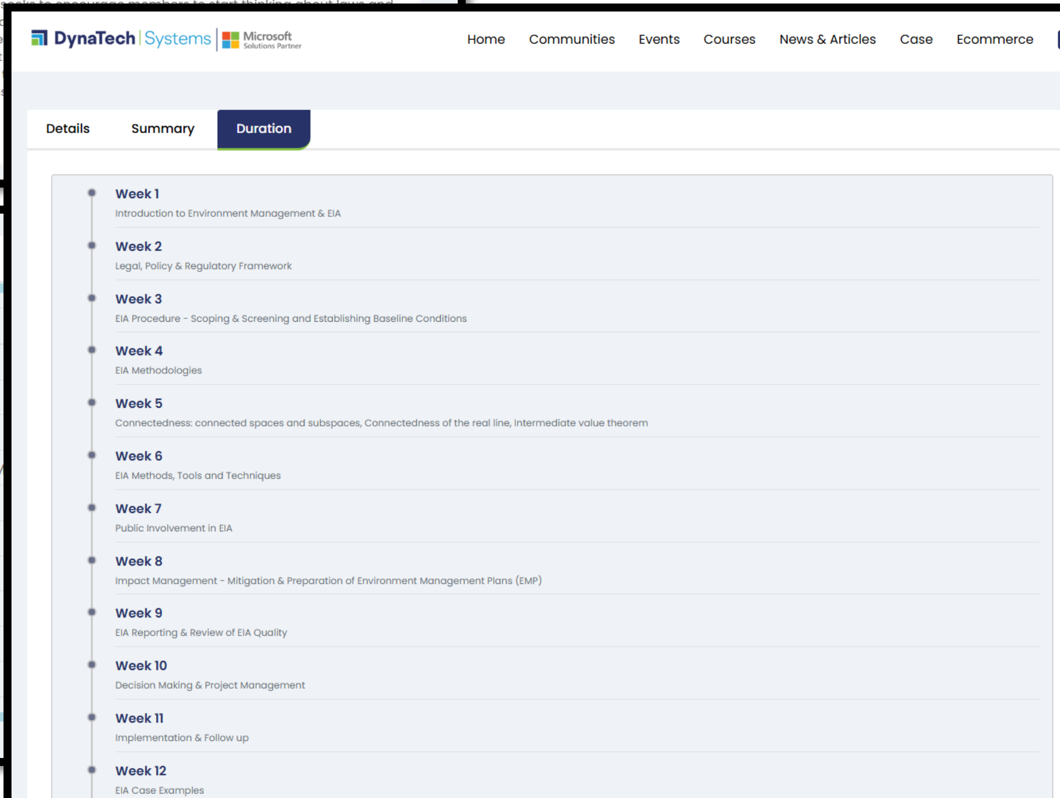
- Courses listed in catalog with filters for level, category, or program.
- Each course displays summary, instructors, CEUs, price, and schedule.
- Learning paths define sequenced courses/modules for career goals.
- Portal shows progress roadmap with “Continue Learning” actions.
- Completion unlocks badges, certificates, or progression to next level.







1. › Certification-linked assessments configured in CRM or LMS.

2. › Supports quizzes, MCQs, timed tests, or scenario-based questions.

3. › Auto-graded for objective questions; subjective answers flagged for review.

4. › Results stored in CRM with Pass/Fail status and next-step triggers.

5. › Admin dashboards track completion rates, average scores, and item analysis.

1

› Learners access tests from portal “My Courses” after completion.

2

› One-time or multiple attempts allowed based on rules.

3

› Proctoring and timer controls ensure exam integrity.

4

› Outcomes drive certification: Passed → badge issued, Failed → retry option.

5

› Integrated workflows handle exceptions, manual overrides, and accommodations.

1 › Digital badges and PDF certificates auto-generated upon completion.

2 › Templates include program name, member details, date, CEUs, and QR validation ID.

3 › Certificates available via email and portal; optional social sharing.

4 › Integration with platforms like Credly or OpenBadges supported.

5 › Admin manages issuance logs, re-issuance, and public validation tools.

1. › CEUs pre-configured per course, event, or activity.
2. › System automatically updates member profile upon completion.
3. › Portal shows lifetime CEUs and breakdown by category or certification.
4. › Renewal reminders triggered 90/60/30 days before expiry.
5. › Admin dashboards track renewal conversion, at-risk members, and compliance.

1 › External LMS (Moodle, TalentLMS, Canvas) integrated with CRM via APIs.

2 › Supports SSO for seamless learner access.

3 › Sync enrollment, completion, and assessment data back to CRM.

4 › Option to manage learning internally via D365 + Power Pages.

5 › Decision criteria: scalability, reporting needs, and user experience.

1
- Dashboards track enrollments, completions, CEUs, and certification trends.

2
- Drill-down by program, course, role, or time period.

3
- Identify drop-off points, most popular certifications, and learner satisfaction.

4
- Benchmark completion and renewal rates against standards.

5
- Insights guide future program design, pricing, and learning paths.

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Communities & Collaboration

Foster Collaboration, Networking, and Engagement

Provide associations with digital tools to build thriving communities, encourage knowledge exchange, and recognize member contributions.

Opt-in directory for networking and collaboration.

Member Directory

Structured online forums with moderation and analytics.

Forums & Discussions

Create interest-based groups and professional networks.

Community Spaces

Manage opportunities, applications, and recognition.

Volunteer & Committee Management

Publish updates, thought leadership, and policy information.

News & Articles

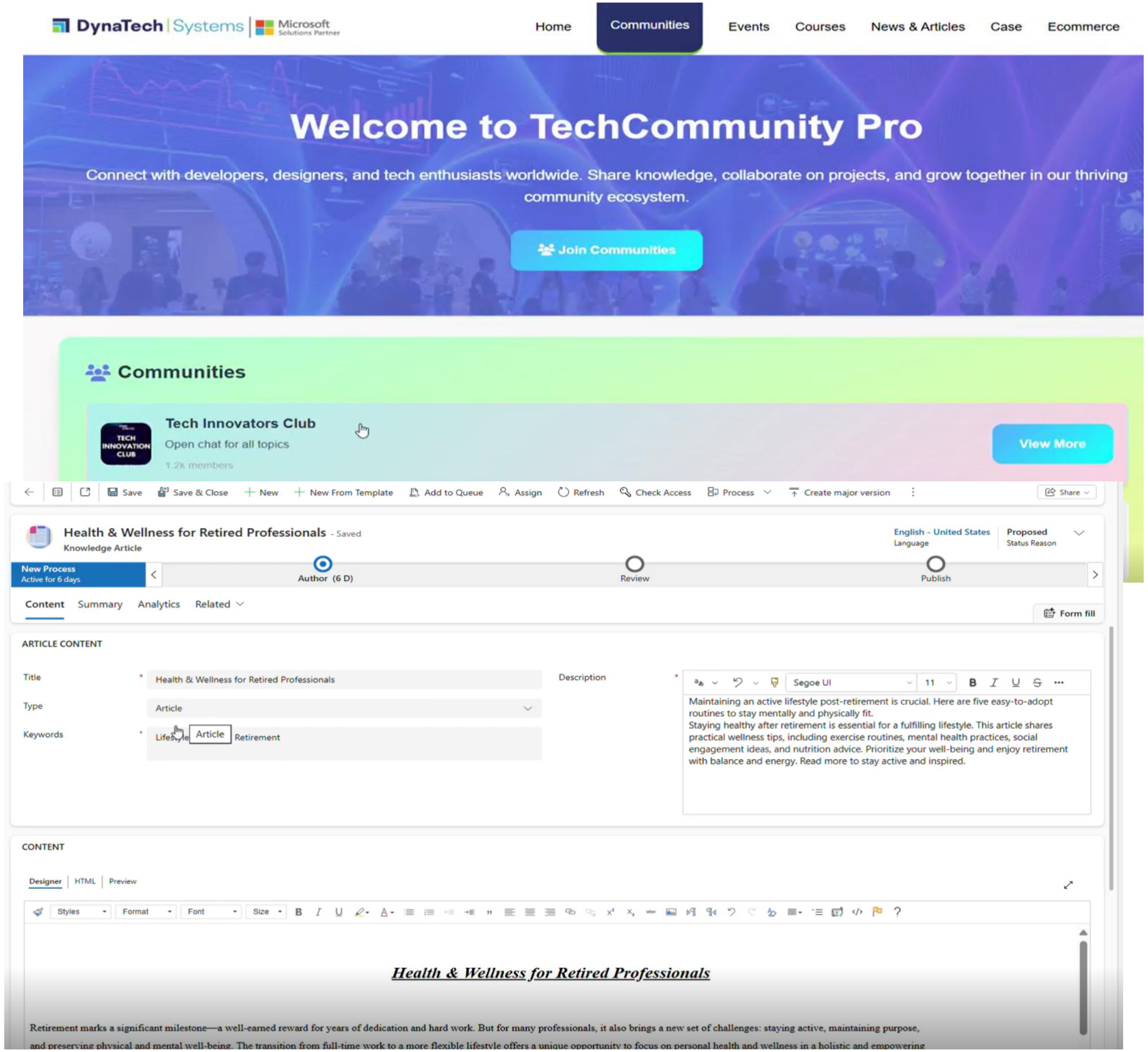
Celebrate member contributions with awards and badges.

Recognition & Awards

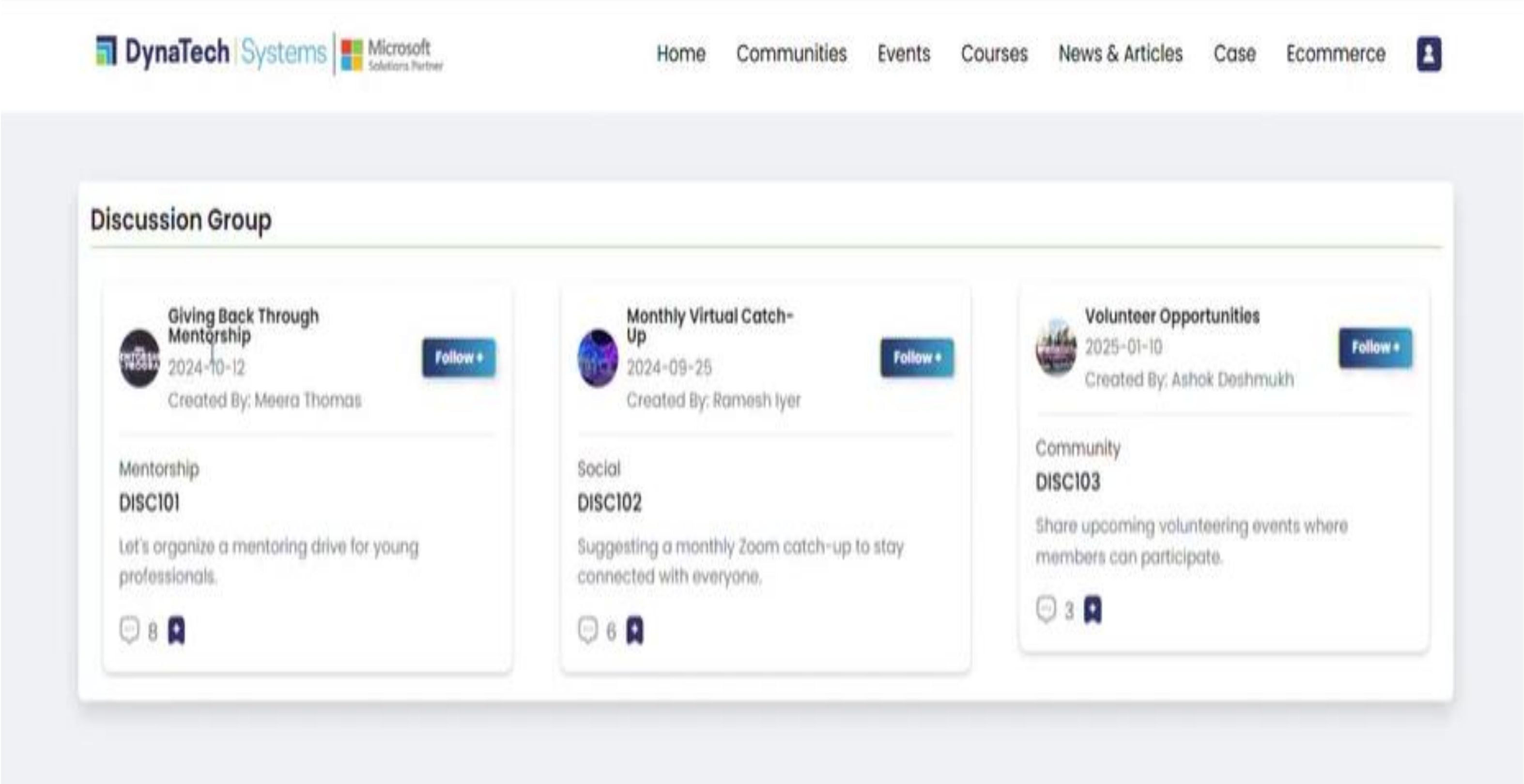
Monitor participation, volunteer impact, and engagement trends.

Analytics

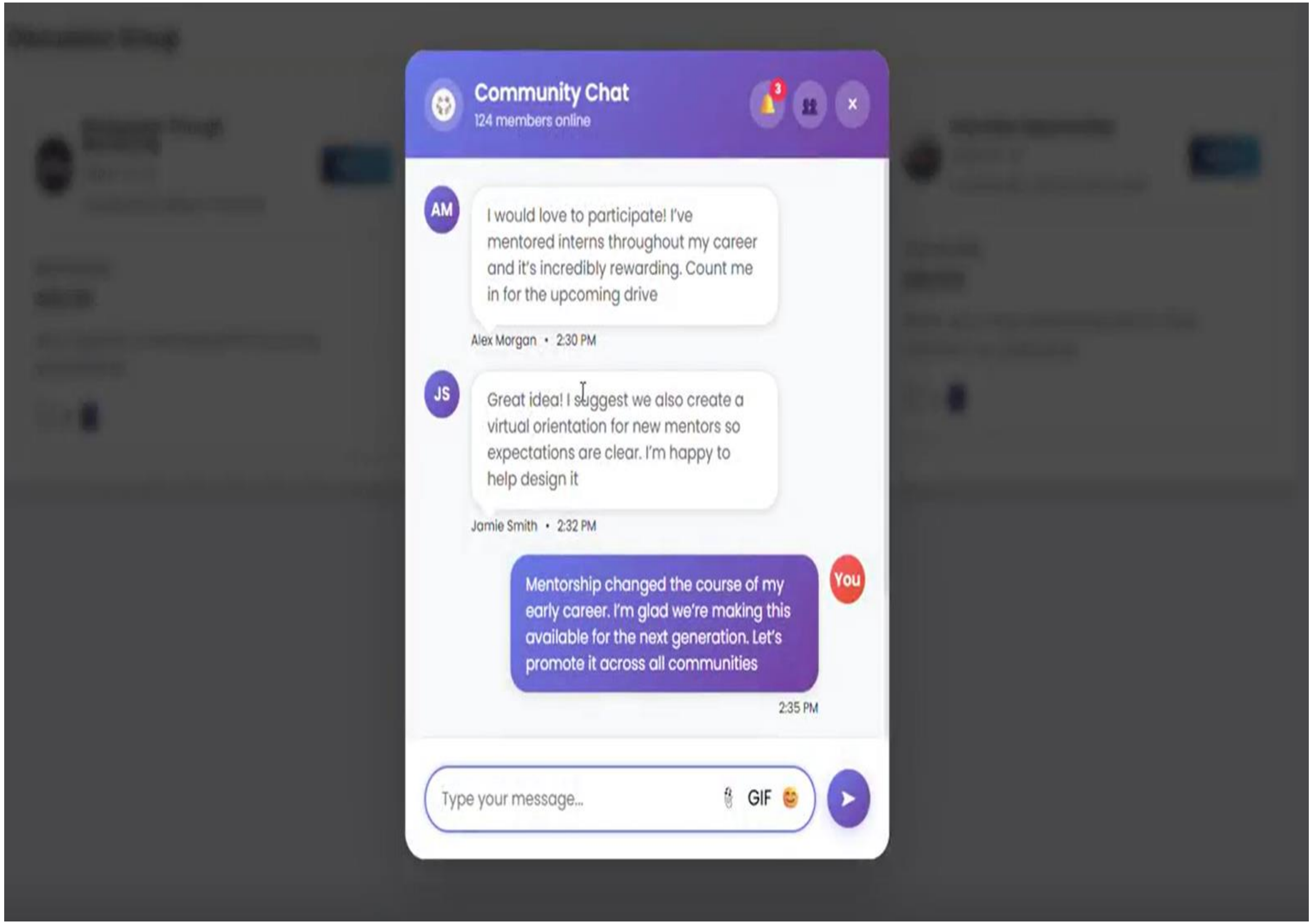
- Build vibrant member communities with secure collaboration spaces.
- Discover people via rich Member Directory and connect by chapter/interest.
- Host forums & discussions, publish news & articles, and manage volunteers & committees.
- Recognize contributions with badges & awards to fuel engagement.
- Dashboards track participation, sentiment, and program impact.



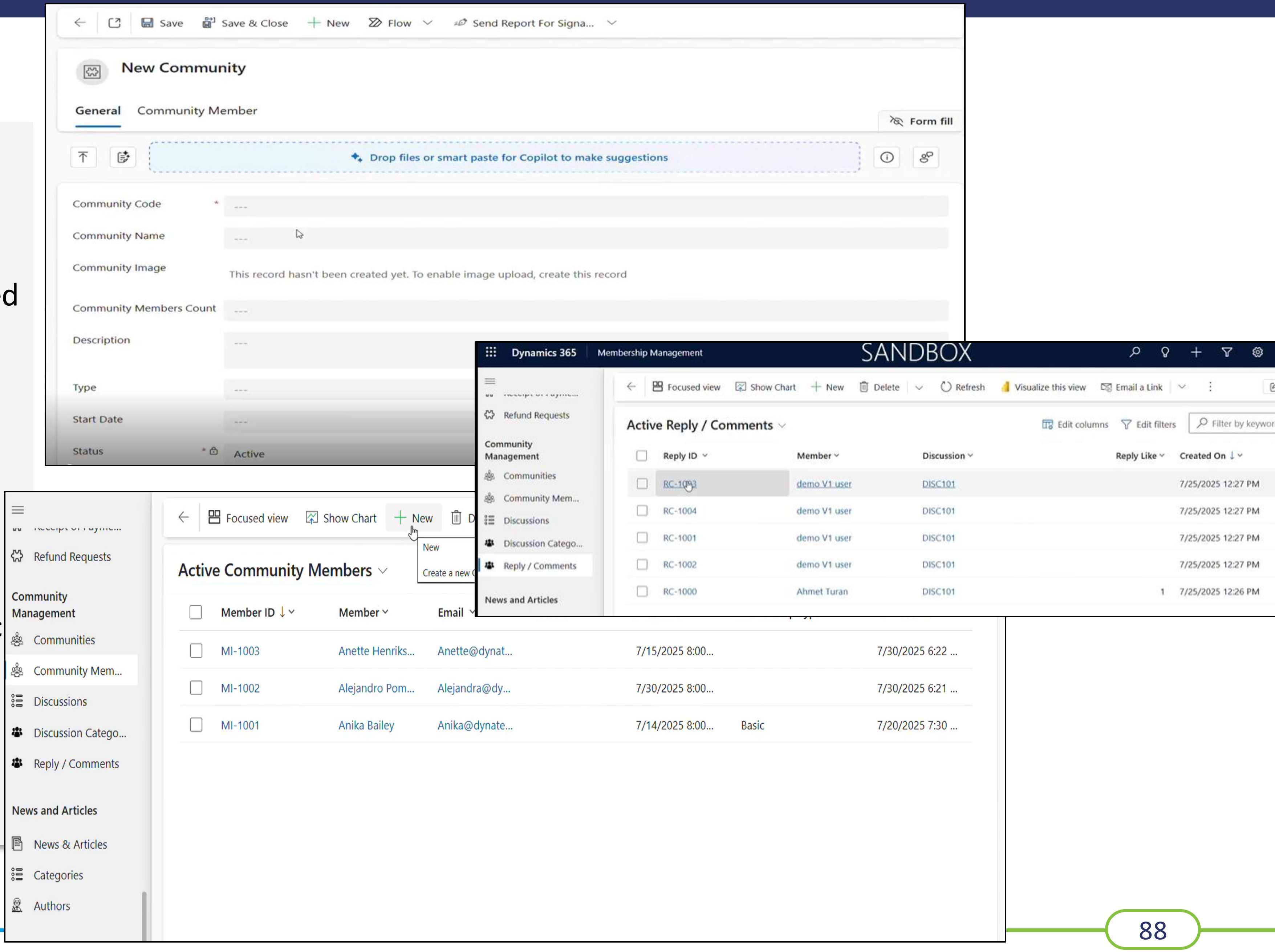
- Searchable directory of members and organizations with profile cards (photo, role, chapter, skills).
- Filters: location, industry, interests, certifications, committee roles.
- Privacy-aware: members choose visibility of phone/email, social links.
- One-click actions: connect, message (portal inbox), follow, or invite to groups.
- Admin controls for verification, profile completeness nudges, and abuse reporting.



- Topic-based forums (e.g., training, legislation, chapter rooms) with threads, replies, and @mentions.
- Moderation tools: pin/lock, flag review, move/merge topics, profanity/spam filters.
- Rich posts: images, files, code/quote blocks, polls; subscribe to threads or tags.
- Engagement signals: likes/reactions, accepted answers, “best reply” badges.
- CRM sync: participation logged on the member timeline for engagement scoring.



- Secure "My Groups" spaces for committees, volunteer teams, projects.
- Features: announcements, threaded discussion, shared files (minutes, charters), and calendars.
- Optional embed with Microsoft Teams/SharePoint; SSO keeps access seamless.
- Role-based access via Web Roles & Table Permissions; private vs public views.
- Notifications: new thread, file update, meeting reminders; audit trail retained.



1. Opportunities authored in CRM (title, skills, location, duration, openings, related event/committee).
2. Portal listing with filters (skills, availability, onsite/remote, duration).
3. Members mark Interested or Apply; interest logs contribute to engagement score.
4. Auto-expiry/close rules keep listings fresh; dashboard shows active/history.

1. › Guided Apply Now form (prefilled profile, availability, experience, resume).
2. › CRM workflow: Submitted → Review → Shortlisted → Approved/Rejected with email updates.
3. › Skills & interests captured on profile; opportunities tagged with required/preferred skills.
4. › Matching logic shows Recommended for You with Fit Score (Excellent/Good/Low).
5. › Coordinators filter by skills/history and assign to opportunities or committees.

1. Create committees/subcommittees with purpose, term dates, and role roster (Chair, Co-chair, Secretary, Member).

2. Auto-notify assignees; portal shows My Committees (active roles, past terms, documents, meetings).

3. Term tracking & limits (e.g., 2-year terms, max 2 terms); 30-day pre-expiry reminders.

4. Reports: active rosters, upcoming expirations, tenure history for nominations and leadership pipeline.

1. Volunteers log hours by opportunity/committee; Submitted → Approved workflow with coordinator review.
2. Running totals by event/campaign/month & lifetime; thresholds trigger badges (10, 50, 100+ hours).
3. Auto-award badges/certificates; display on profiles and leaderboards (optional).
4. Dashboards: top contributors, trends, spotlight candidates; export for newsletters/events.

1. › Structured publishing in portal: categories (chapters, advocacy, training), tags, author bios.
2. › Editorial workflow: draft → review → publish; schedule posts and feature highlights.
3. › Personalization: show relevant articles by member type/interest/region.
4. › Cross-promo: embed CTAs to events, courses, or volunteer drives.
5. › Analytics: reads, time-on-page, click-throughs; A/B test headlines and hero images.

1. › Award types in CRM (Volunteer of the Month, Lifetime Service, Rising Star) with criteria.
2. › Open nominations via portal (reason, evidence attachments); review panel scoring.
3. › Status flow: Submitted → Under Review → Approved/Rejected; winners auto-notified.
4. › Issue digital certificates/badges; display on My Awards with social share (LinkedIn).
5. › Admin reporting by campaign/year/award to fuel PR and annual reports.

1. › Fine-grained access using CRM teams + portal Web Roles; private committees and member-only threads.
2. › Content governance: moderation queues, audit logs, and configurable retention.
3. › Consent & preferences honored across directory visibility and notifications.
4. › Abuse/spam reporting with escalation workflows; rate-limits to protect community health.

1

- Community dashboards: active users, posts/replies, response time, accepted answers.

2

- Volunteer KPIs: applications, approvals, hours logged, fulfillment rate by skill/location.

3

- Committee health: roster coverage, term expirations, meeting participation.

4

- Content analytics: top articles, forum topics, sentiment trends.

5

- Engagement scoring funnels (read → post → volunteer → committee) to guide growth tactics.

Want to know more?

Contact Us!

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