



UpBeat

The Membership and Event Management Solution



What is UpBeat?

UpBeat is a membership and events management solution for membership and event centric organisations such as professional associations, not for profit organisations, government bodies, trade unions, sports clubs and the like. It provides the tools to manage and maximise the myriad of relationships your organisation maintains with members, supporters, sponsors and other stakeholders.

“UpBeat provides you with out-of-the-box functionality for automating all member processes within and across your entire organisation.”

In addition to relationship management, UpBeat includes integration with financials, supporting activities such as ticketing, barcoding, membership renewals and enhances your marketing and event management capabilities.



Built from experience

No matter how big or small your project, the biggest factor in its success or failure is likely to be who you choose for your implementation partner.

In almost 20 years of creating IT solutions for Australian and international businesses, Professional Advantage has made significant investments into staff skills, processes and methodologies to ensure that our client projects deliver maximum value with minimum risk.

During that same period we've also developed a special understanding of the particular challenges facing membership organisations. Through engagements with professional and trade associations, not for profit organisations, sports clubs and other member-oriented organisations across the country, we've been able to craft and fine tune systems that proactively help our customers to make the most of the myriad stakeholder relationships that they deal with every day. UpBeat is the natural result of this experience.

UpBeat integrates with leading products including:

- Microsoft Dynamics CRM
- Microsoft Dynamics GP
- Microsoft Dynamics RMS

Professional Advantage Fast Facts:

- Dedicated helpdesk
- Online support & services
- Proactive account management
- Quality training services
- CRM and membership management experts
- Microsoft Gold Certified Partner
- Microsoft Presidents Club



Integrated for a complete picture

A membership management system that doesn't talk to an organisation's financial software makes no business sense whatsoever.

Membership fees and subscriptions, events and sponsorships are all integral components of your income. Transactions that are generated via membership management software should be immediately reflected within the company's overall financial picture. What's more, all revenue should be matched to any associated costs so that the financial viability and success of an activity can be easily evaluated.

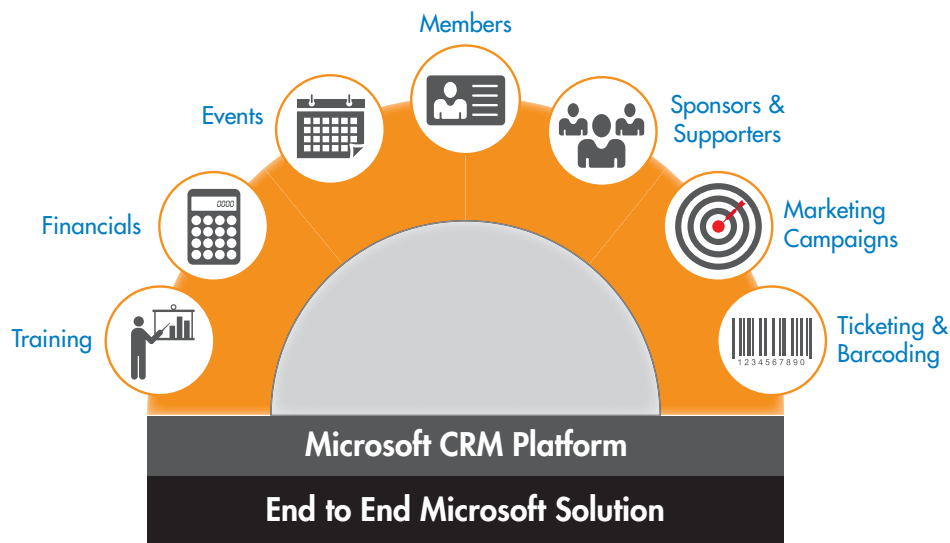
These are the capabilities that UpBeat brings to your administrators and managers.

Tight integration with core business systems ensures that all financial transactions including debtors, general ledger postings, bank reconciliation updates and audit trails are automatically and transparently recorded. Product-level general ledger postings offer full revenue matching capabilities so that the profitability of all events and projects can be easily monitored. Each component of a membership, sponsorship or any other transaction may be posted to a revenue account, deferred account or clearing account as required.

The result is a solution that works across the spectrum of the organisation's activities to deliver greater financial visibility, flexibility and control.

UpBeat Competitive Difference

UpBeat: Combining world-class Microsoft technologies with business know-how and superior service from Professional Advantage



The competitive edge with Microsoft

Microsoft provides the market-leading technical solutions that help your people to be more innovative, work collaboratively and to increase your organisation's competitive edge. As one of Microsoft's most experienced Australian partners, Professional Advantage builds on this base with robust industry and task-specific functionality, tuning the solution for optimal performance.

With UpBeat, we've focused on the key areas of critical importance to member-based organisations - such as the integration of unique membership and event management functionality with core financial systems, enhanced service delivery for all stakeholders, marketing tools and integrated ticketing and event management.

“It's a solution designed to increase your memberships, grow your bottom line and effectively manage business expansion.”

UpBeat Membership

Build stronger connections with your members

Your members can be loyal patrons but in return for unwavering support, they do like to be recognised and this is where UpBeat can help.

The software captures a complete history of every member interaction including every renewal, product purchased or event they attend. It creates a unique history for each and every one of your members and provides your staff with an invaluable customer service reference.

“UpBeat greatly reduces the membership renewals administrative burden for both members and staff.”

It automates correspondence and the allocation of membership entitlements such as discounts, magazine subscriptions and other benefits, and enables the introduction of greater flexibility in product offering and payment options.

Designed to support an unlimited number of membership categories, the system also automates the offer and delivery of tiered entitlements or special promotions to help you develop closer relationships with your members. For example, the software makes it easy to reward longevity of membership with prioritised ticketing or to provide special offers for particular membership categories.

Market to members

The depth of membership data contained within UpBeat smoothes every organisation's marketing process by enabling tight targeting along with the automated issue of correspondence such as diary alerts, invitations, subscriptions, retail offers and booking information.

Simple to use member analysis enables you to identify those members most likely to respond and provides essential information when creating prospect lists for early bird discounts, bulk ticketing offers or priority seating.

Membership Key Features:

- Unlimited membership categories & classes
- Membership details & history records
- Business rules enforcing membership options
- Automated invitations to renew membership
- Records & reports on all merchandise sales
- Flexible payment options
- Workflow to ensure members receive their entitlements





“ It will help you better understand your members and supporters, and will become a key tool as you plan the development of future products and services. ”



Understand what sells

UpBeat stores transaction data for every member or contact, allowing staff to see at a glance whether a member has renewed their membership or if they have attended any events. If you have retail operations, through integration with retail point of sale systems you can see if the member has purchased any items from your shop or website.

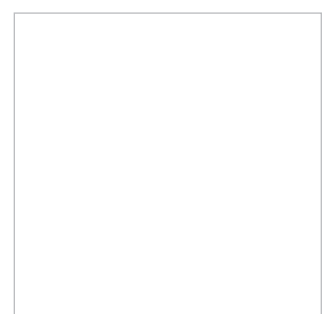
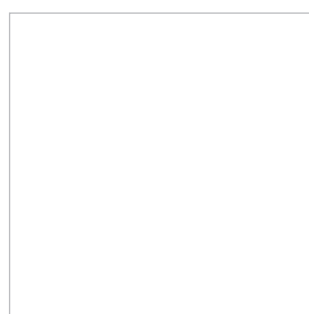
Besides enabling more personalised customer service, this data can also be used to identify trends and demographics relating to purchasing or booking behaviours.

Develop your extended family

The same breadth of functionality can also be applied to your relationships with other stakeholders such as subscribers, sponsors, board members, governing bodies and regulatory authorities. Imagine software that helps you to encourage supporters, developing the relationship as they progress from occasional event attendance to full members.

Or consider a system that allows you to demonstrate value to sponsors through enhanced reporting such as the number of attendees at a sponsored event. It allows you to meet contractual arrangements with sponsors faster through an automated workflow and quick access to data. It's a strong foundation for the development of mutually beneficial projects and promotions.

At the macro level, UpBeat shows you what your stakeholders want, what they respond to, which of your activities are working and which ones are not. At the individual level, it will help you to identify interests and preferences, more effectively target communications, and ultimately create closer, more profitable relationships.



UpBeat Events

Energise your events

When it comes to events, UpBeat helps to keep all your activities in step and on time.

Regardless of whether you are managing a major one-off show or a weekly educational session, UpBeat has the tools to support you from planning through to execution and final reporting.

Starting with budgeting and approval the software will step your staff through all the requirements necessary to make your event a success.

“UpBeat will even assist you with the seemingly little details such as printing out name cards and attendee lists.”

Perhaps most importantly, UpBeat puts you in greater financial control of your event through immediate, up-to-date access to ticket sales and revenue data throughout the lifetime of the project, complemented by comprehensive pre- and post event reporting. It allows you to track event profitability by accurately matching revenues to costs according to the unique business processes in your organisations.

Events Key Features:

- Event theming
- Event promotion
- Venue management, from initial booking through to set up and tear down of equipment
- Seating allocation, be it a sports arena, ballroom or simple meeting room
- Registration and ticketing including preferential seating, variable rates and bulk discounts
- Payments by cash, credit card or on account
- Catering, including the ability to note special dietary requirements
- Speaker and entertainment requirements



UpBeat Finance

Flexible, Comprehensive Finance

UpBeat contains all the functionality necessary to manage membership-related finance activities including invoicing and payments. It also automates many every day processes, reducing administrative overheads and time demands on staff.

Renewal notices, for example, can be generated based on the previous year's membership records. As it creates the renewals the system automatically applies and enforces business rules such as qualification criteria or number limits per organisation.

The underlying rules engine also allows each organisation to stipulate their own business requirements and to define payment methods and terms – such as monthly payment plans for members or phased invoicing for sponsors. Designed for ultimate ease-of-use, the rules can be created and updated by any authorised user and do not require developer-level expertise.



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