

## Alumni Software Features

**The most features by far. All integrated together in one easy to use system. Constantly improving. Use as few or as many as you want. No charge for extra features.**

Alumni Software provides **online registration** and **alumni management software** that will help you better manage and promote your alumni community and events. There is no hardware to buy or maintain as our solution is hosted so all you need is a PC with an Internet connection. Participants can register for activities or membership online anytime from any Internet-connected computer. This document describes all of the key features provided by Alumni Software and is intended to supplement an online demonstration by our staff.

## Online Registration Features

Most clients start with us by asking questions about online registration. That's something we do really well. What really distinguishes Alumni Software is our flexibility and customization. Online registration occurs on a custom website we provide for you and is controlled by a powerful desktop application you install on your PC.

### Online Registration Features

- Online Registration including waitlists
- Secure Online and Offline Payments
- Automatic Recurring Payments
- Membership including renewals
- Automatic Receipts and Confirmations
- Personal Account
- Referral Marketing
- Online Donations and Sponsorship

**Online Registration including waitlists** Ask any question you want with the answers automatically added to your database. This greatly reduces or eliminates manual data entry saving many hours and expenses. Registrants find our online registration easy to use and very reliable. The current registration status of all programs is automatically displayed on the website (open, closed, waitlisted or full) based on real-time registration levels.

**Secure Online and Offline Payments** We are a Payment Card Industry Data Security Standard (PCIDSS) Level III certified company that provides safe, secure and encrypted credit/debit card processing with real-time validation. Compliance is verified by an independent third party. Offline payment can be made by check or purchase order. Contact us for additional currency requirements.

**Automatic Recurring Payments** For ongoing activities with large registration fees automatic recurring payments over a number of months is a big time and expense saver. Registrants set-up their recurring payment by credit or debit card which is then automatically processed for the time period chosen by the organization.

**Membership including renewals** For membership based organizations, create your own membership levels and pricing. Offer member only activities, content and pricing. Membership expiration can be set to the calendar year or a unique organization date. Renewals are processed automatically. Memberships are also searchable with the database for quick reference.

**Automatic Receipts and Confirmations** Branded email receipts are automatically generated providing confirmation for registration and payment(s). This reassures registrants and saves considerable time and expense. Receipts are also automatically generated for other actions such as donations and WebStore sales.

**Personal Account** Registrants and members are provided an online account allowing them to access their personal information 24 x 7 using their username and password. From their account they can verify activity details, make online payments, reprint receipts and update personal information. More accurate information is one result. Another big time and expense saver.

**Referral Marketing** Increase participation 20% to 40% at no cost with this simple feature. Registrants can easily invite friends, co-workers and colleagues they think might be interested. Tell-a-Friend sends a personal, client branded email message which includes a link to the registration page of the activity being recommended.

**Online Donations and Sponsorship** The website enables online donations and sponsorships. Easily

create fundraising campaigns for any type of donation. Donations and sponsorships can be done directly and in conjunction with online registration.

## Alumni Management Features

We don't have to tell you that there is a considerable amount of effort, complexity and coordination that goes into running a successful alumni community. This is where Alumni Software really shines with features that help automate many of the routine tasks you need to do perfectly.

**Client Branded Website** A client branded website is included. Your branding is what is important, not ours. The website is flexible and extensive so many clients use it as their primary website. Others seamlessly link from their main site.

**Non-technical Website Publishing** The desktop application makes it easy to change website navigation and content as often as you want. Designed for non-technical staff it uses a Microsoft Word like WYSIWYG tool. Add pages, upload images, change content and updates are made instantly without the need for and coding or technical staff. Add RSS feeds easily or advertising links

**Registration Set-up and Management** Setting up new, registerable activities is easy using "wizards". Standard questions are set-up once then easily reused. Early, regular and late registration times and fees are supported. Activities can also be set-up in Excel and imported. Set-up includes automatic calendar driven website publishing and removal. The desktop provides real time information on registration activity enabling quick status checks and adjustments. Reporting and messaging are built in.

**Secure and Controllable Data Access** You own your data and control who can see it. Access to your data is provided through the desktop which requires a unique username and password together with matching license key. Passwords must be changed every 90 days. The license key is unique and personal and cannot be shared. This provides a significantly more security than web based applications. Access levels are customizable; you determine who gets access to what specific information (e.g., only the website) and what they can do with it (e.g., view but not edit or delete). There is no restriction on the number of people you allow to have access your data nor additional cost.

### Alumni Management Features

Client Branded Website	▶
Non-technical Website Publishing	▶
Registration Set-up and Management	▶
Secure and Controllable Data Access	▶
Payment Management	▶
Credit Card Processing	▶
Reporting including dashboards	▶
Branded E-communications	▶
People and Account Management (CRM)	▶
Volunteer Management	▶
Sponsorship and Revenue Management	▶
Automatic Event Reminders	▶
Membership Management	▶
Pre and Post Event Surveys	▶
Hotel Management	▶
Invites	▶
Image and Document Repository	▶
Online Advertising	▶
Website Analytics	▶
Online Store	▶

**Payment Management** The desktop allows you to determine the methods of payment you accept for both online and offline transactions. Currently supported payment methods are credit card, debit cards, check and PO. If you choose to allow payment by check, you can also set payment terms. This is particularly important for waitlists. Determining payment status is easy via dashboards and reports. Following up on unpaid amounts is quick and simple.

**Credit Card Processing** Unlike most providers we never handle client funds. Client's set-up their own credit card account and all funds flow directly to your bank account. We have made arrangements for clients with Pinnacle Processing Group and Authorize.net. Rates vary depending on which provider is used. All financial reports are permanently stored in the desktop application.

**Reporting including dashboards** The desktop provides access to all your data in real-time. Dashboards provide status at a glance. Ad hoc questions are easily answered with a few clicks and an export to Microsoft Excel. Standard reports provide details on typical

activities like registrations or payments. Custom reports provide additional details.

**Branded E-communications** The desktop allows you to send out an unlimited number of e-mail messages which are client-branded for a professional look. An E-Newsletter is built in making it easy to communicate important information and to promote upcoming activities to your entire community. You can import lists of email addresses making it easy to invite new alumnus to participate. There are a number of template emails (e.g., invoice) plus custom. E-mails can be sent from anywhere in the desktop with a click. Various emails are sent out automatically such as waitlist notifications or recurring payment receipts. All emails sent out are automatically tracked and so can be easily resent.

**People and Account Management (CRM)** The desktop includes a comprehensive and searchable "view" of all activities undertaken by each person. This includes every point of contact such as registrations, payments, sponsorships, emails plus addresses and user names. This comprehensive database is a very valuable asset. Family members can also be viewed together as an account. This makes it especially easy for administrations to answer any questions that come up.

**Volunteer Management** The desktop allows you to create as many volunteer types as you need with custom naming. Volunteers can have different levels of access to registrant data. Volunteers can be solicited as part of the registration process or separately. Volunteer screening is supported. Once volunteers are assigned to an event they automatically gain access to rosters and are included in volunteer-to-volunteer lists that only other volunteers have access to. It is also easy to list and thank them on the website.

**Sponsorship and Revenue Management** The desktop allows you to create fundraising campaigns with custom naming and amounts. Sponsorship is also supported either as part of the registration process or separately. Recurring payments for donations are supported. It is also easy to list and thank them on the website.

**Automatic Event Reminders** Automatic email reminders are another highly appreciated feature by all. Reminders include all scheduled events with maps and driving direction links. Attendees can easily add special announcements or messages to keep everyone informed and on time.

**Membership Management** The desktop allows you to create different levels of alumni membership with

custom naming and pricing. Upselling between membership types is supported. Different prices can be charged for activities based on membership and there can be member only activities. Renewal dates can be based on the calendar year or on a specific date.

**Searchable Alumni Directory** Alumni members are automatically listed in a searchable directory. Searches can be done for various attributes including geography. The alumni directory can be either public or private and viewable only by other alumni members..

**Pre and Post Surveys** The desktop allows you to create custom surveys which can be emailed out to any group including registrants or last years attendees. All survey results are automatically tabulated and available as either a dashboard view or report. Surveys are a proactive way to solicit feedback that provides great information for decision making future classes or events.

**Hotel Management** We simplify and streamline housing and/or hotel room block management via our Passkey™ integration. Passkey is a service offered to hotels and event planners to allow people to reserve rooms at hotels available to that event.

**Invite** Administrators can create simple invitations to organization, program, or other events. These invitations – with or without questions - can be sent to any person with an email address.

**Image and Document Repository** Storage of documents and images for most organizations is an issue we address through the Document and Image repository in the desktop application. The Image and Document repository is part of the institutional knowledge storage and transfer that we enable.

**Online Advertising** Add web ads anywhere on your website easily and quickly. Only your ads will appear and you keep the proceeds. Includes easy set-up for Google, Yahoo, MSN and Amazon.

**Website Analytics** We track all of your website visitors, which pages they visit, the search terms they use most frequently and other useful information.

**Merchandise Sales** The WebStore allows your organization to also sell merchandise in conjunction with online registration. The same or different products can be offered for each registration. Many online sales occur this way making it a valuable option

## Support Features

Our clients consistently tout our exceptional support as one of the key reasons they enjoy working with us. They also appreciate how responsive we are to improving features and making them easier to use.

Support Features	
Unlimited and Free Training	➤
Free Software Updates	➤
Exceptional Client Service	➤
Rapid Activation and Initial Set-Up	➤
Institutional Knowledge	➤
Technology Platform	➤
Reliability and Redundancy	➤
Privacy and Security	➤

**➤ Unlimited and Free Training** The desktop features are easy to use and we include extensive administrator training at no cost. This includes comprehensive and searchable online help in the desktop application and over 60 short online video tutorials showing how to use specific features; both are available 7/24. There is no limit to the number of times the information can be viewed.

**➤ Software Updates** Software releases, containing both new functionality and improvements to existing features, are included for free. These releases typically occur every four to six months and are automatically installed. Continuous quality improvement is our goal so client feedback on how to improve existing features is paramount. Requests for new functionality are next in importance with priority assigned to those items benefitting the largest number of clients.

**➤ Exceptional Client Service** Our staff is knowledgeable, well trained and there to answer your questions. Exceptional service is their goal. Our support staff will quickly respond to email and phone support with most issues resolved in one business day. We have extensive experience working with organizations of all sizes and understand the nuances associated with building the visibility within your alumni community. We regularly share best practices recommendations based on our work with other organizations. Client Services provides unlimited basic telephone and email support from 8:00 AM to 5:00 PM PT, Monday through Friday at no charge.

**➤ Rapid Activation and Initial Set-Up** Our Client Services staff will build and deliver a fully functioning, client-branded website within 15 working days or less of receipt of your website and program content and receipt of a Service Agreement.

**➤ Institutional Knowledge** All of your alumni association's information is stored on our system so you don't have to start from scratch. Our support team can help by showing new staff what to do and enable you to build on prior activities.

**➤ Technology Platform** Our current technology platform is a highly secure, scalable, enterprise class application using state-of-the-art Microsoft technology. It is our second generation platform and built on the learnings from our original platform that launched in June 2001 with 26 subsequent releases. It entered commercial service after two years of development in January 2007. A multi-million dollar investment, Rainier was designed from the ground up as a Software-as-a-Service (SaaS) application to provide maximum flexibility and integrated functionality for our clients. The usability and feature set is unrivaled in the industry.

**➤ Reliability and Redundancy** The reliability of our systems is one of our top priorities. All hardware is redundant with automatic load balancing and failovers in place at multiple levels. Hosting is in an ultra secure, Tier One data center with biometric security, live guards and monitoring 24/7 with multiple drops of redundant bandwidth and full back-up power. Data back-ups are done nightly and stored offsite with our back-up servers to provide additional redundancy.

**➤ Privacy and Security** Protecting your data is another of our top priorities. Unlike many of our competitors we are very clear that you own your data and we have no rights to it. Accordingly, it cannot be rented, reused, distributed or shared. Access to your data requires unique usernames and passwords plus a personal license key. We also go great lengths to secure and protect your data against fraud, viruses, hackers and other threats. This is particularly the case for credit card information. We are a PCIDSS certified credit card processor that exceeds the certification standards. We utilize state of the art encryption and industry best practices for processing, transmission and handling of credit card information. Certification includes at least monthly third party review of our credit card processing procedures and protocols including encryption, collection, transmission and storage of credit card information, employee background checks and server facility security standards.

We hope this has helped you to understand why Alumni Software is the trusted software-as-a-service (SaaS) solution for thousands of organizations, tens of thousands of activities, millions of registrations and hundreds of millions of dollars in transactions. We would like you to be our next valued customer!

Call Us 1-866-613-8942

**alumni**software

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