



# CRM Core Module:

## MEMBER/PARTNER MANAGEMENT MODULE

The Member/Partner Management Module is the central location of the CRM for all information and history related to your members and partners. Throughout each module in the CRM, the system automatically records activities and interactions that are tied to your local member and partner accounts to easily track and report the benefit of their membership/partnership with your DMO.

- Capture and manage business listing descriptions, coupons, leisure events, amenity and meeting facility details, and account images and logo files.
- Manage dues and invoicing.
- Report the value your bureau is generating for partners from automatically tracked benefits.

## FEATURED TOOL: BENEFITS SUMMARY

This reporting tool, located within each Member/Partner account record within the CRM and accessible in Partner Extranet Portal, displays an abstract of the valuable interactions that have been associated with a specific Member/Partner record. View the following benefits:

- An overview of the monetary value of contributions from and DMO expenses to the Member/Partner account
- Leads, Service Request, and Referral data segmented by each module
- Details of the events invited to
- Media exposure, circulation, and ad value
- Listing and coupon views and clicks
- Co-Op Advertising participation
- FAMs/Site inspections participation, including details of being a host or service provider



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## MEMBER/PARTNER EXTRANET PORTAL

Designated member contacts can access their accounts via a password-protected, secured, online portal. Depending on the permissions your DMO grants, member/partner contacts can access a variety of functions like the ability to pay dues online, manage their account details including image uploads, Listing, Leisure Event, and Coupon descriptions, and Meeting Facility and Amenity details. In addition, member/partner contacts can view, respond, and add actualized room details for Meeting, Sports, and Tour leads.

- Fields can be rearranged and grouped in any order, marked as hidden, or updated with user-friendly hint text by CRM admins
- Affiliated accounts in the CRM allow contacts to manage multiple account records and avoid duplicate contact records
- Individual reports and bulletins can be set to be visible to specific Member/Partner Contact records
- A gallery of branded images with links to webpages can be displayed on the homepage of the portal

