

Centauri Membership Solution

The Centauri Membership Solution gives you a rich set of membership features delivered on Microsoft's best of breed Dynamics 365 platform empowering you to deliver state of the art services to your members.

Leveraging the strengths of the Dynamics 365 platform, the Centauri Membership solution connects your members to you via online web portals and your membership operations to the full suite of Microsoft solutions including Office 365, SharePoint, Power BI and many more.

Benefits at a Glance	
 <small>shutterstock.com • 1117957529</small>	<p>Experience a 360 view of your members allowing you to see the complete picture of your membership in real time. Leveraging the full power of the Dynamics 365 CRM platform to ensure you have a complete record of your members and a comprehensive and reliable set of member data.</p>
	<p>Deliver membership services to your members online via CRM Web Portals allowing members to purchase products and services online including training and member events. Provide services such as Find-A-Member and online news and knowledge base services. Provide mobile responsive web portals that give your members access from anywhere.</p>
	<p>Access dashboards, charts, views and forms which give you complete visibility over your membership with segmentation by multiple measures including divisions, fee categories, membership status and territory. Maintain a real time view of membership operations and communications, including email tracking and visitation operations.</p>
	<p>Use the strengths of Microsoft Dynamics 365 CRM to connect your Membership processes to the full range of Microsoft services including Office 365, SharePoint, Power BI, Power Apps, mobile apps, OneDrive, OneNote and more.</p>
	<p>Automate membership invoicing using popular payment gateways along with automated renewals processing and communications. Offer your members payment options monthly, quarterly or annually via credit card or direct debit. Your members can pay their invoices online via a web portal</p>
	<p>Manage and deliver events for your members and have members register and pay for events online. Track registrations and link your events to membership records and office documents.</p>
	<p>Manage your training services to your members including online booking and payment through web portals.</p>

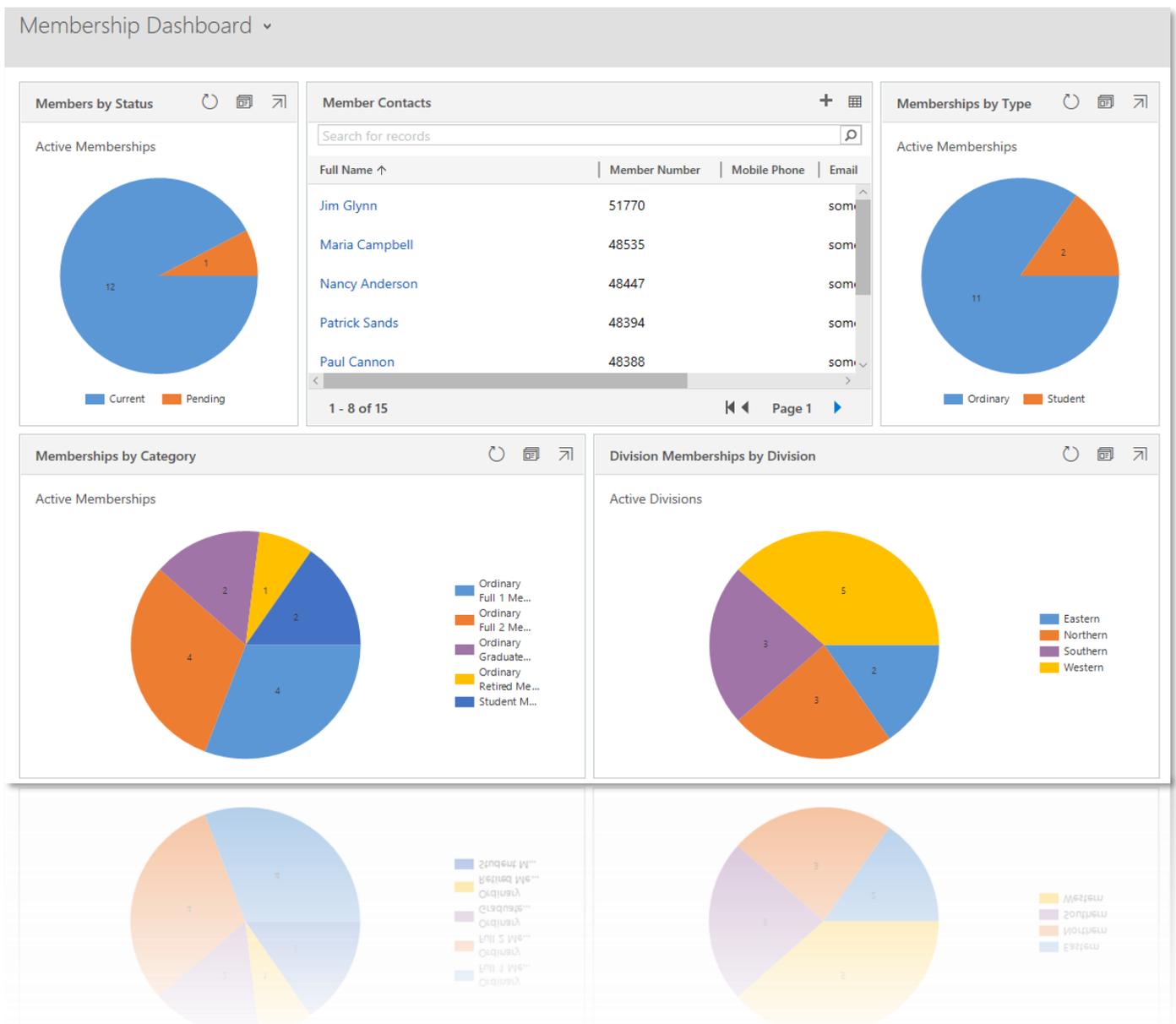
Centauri Membership Solution

The Centauri Membership Solution provides the functionality you need to manage your members and deliver the services they expect of you. The solution extends the core strengths of the Dynamics 365 platform by adding a rich set of features that allow membership based organisations to provide their members with a comprehensive service.

A Complete View of Your Members

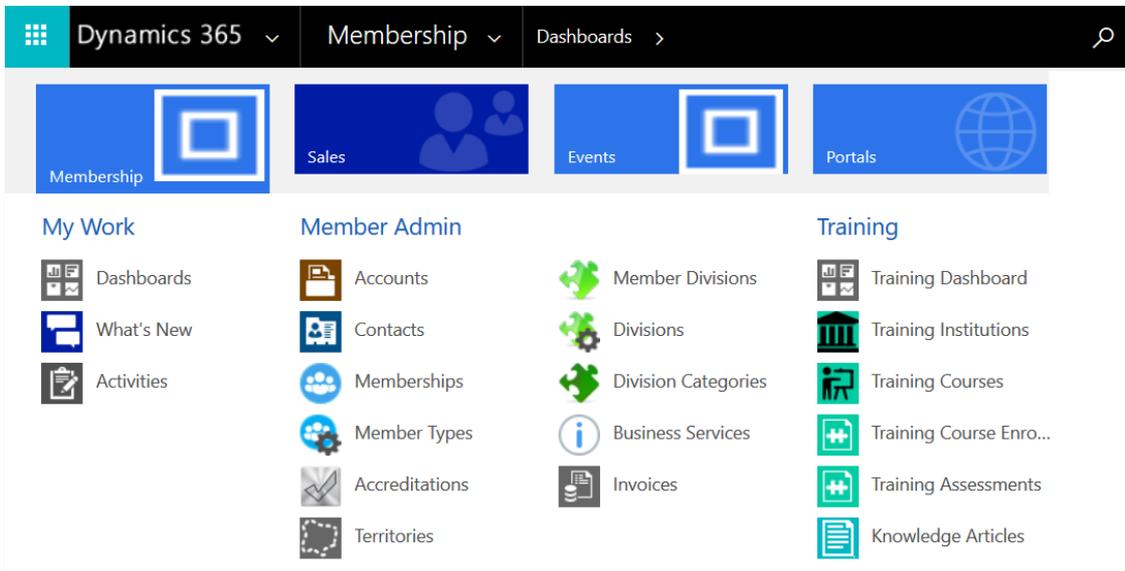
The membership records functions delivered by the solution provide you with a complete, real time overview of your membership, delivered via dashboards, charts, views and forms that can be tailored to view your membership data your way.

The Centauri membership solution allows you to record and report on your membership using a range of segmentation criteria and deliver reporting and operational controls based on segmentation.



Feature Rich Membership Records

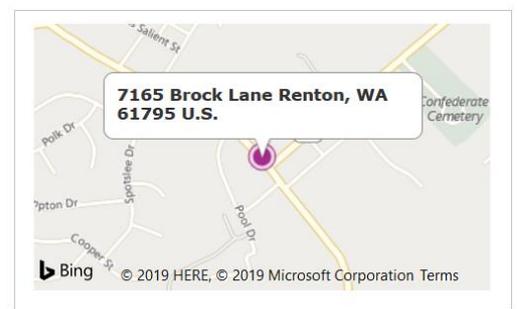
The Centauri Membership Solution provides all the record types and relationships you need for a comprehensive membership database. Centred on the solid foundations of Dynamics 365 records for Accounts, Contacts, Invoices and Activities, the solution provides interrelated records for Membership, Training, Events and Portal functions.



The screenshot shows the Dynamics 365 navigation pane for the Membership solution. At the top, there are tabs for 'Dynamics 365', 'Membership', and 'Dashboards'. Below these are four main navigation areas: 'Membership', 'Sales', 'Events', and 'Portals'. The 'Membership' area is expanded to show three columns of options:

- My Work:** Dashboards, What's New, Activities
- Member Admin:** Accounts, Contacts, Memberships, Member Types, Accreditations, Territories
- Training:** Training Dashboard, Training Institutions, Training Courses, Training Course Enro..., Training Assessments, Knowledge Articles

CONTACT INFORMATION	
Full Name *	Jim Glynn
Contact Type *	General
Position +	Owner
Email +	someone_j@example.com
Business Phone *	555-0109



MEMBERSHIP : INFORMATION		Member Type *	Status Reason	Joined Date
A. Datum Corporation (sample) - Ordinary		Ordinary	Pending	2/04/2019
General				
Member Contact	Jim Glynn	Web Login		<input type="checkbox"/>
Account	A. Datum Corporation (sample)	App Scanned / Uploaded		<input type="checkbox"/>
Member Type *	Ordinary	SIG		<input type="checkbox"/>
Member Category *	Ordinary Full 1 Membership Fee	Directory Entry		<input type="checkbox"/>
Application Date +	28/03/2019	Kit Sent		<input type="checkbox"/>
		MTAQ Staff Notified		<input type="checkbox"/>
Nominations				
Nominated By +			
Seconded By +			
<div style="display: flex; justify-content: space-between;"> ACTIVITIES NOTES ONENOTE </div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> Enter a note </div>				

Online Service for Members

The Centauri Membership Solution delivers online functions through the Dynamics Portals service allowing members to purchase products and services online such as training and member events. You use the portals functions to provide services such as Find-A-Member and online news and knowledgebase services. The web portal service provides mobile responsive web pages that give your members access from anywhere.



Find a Member

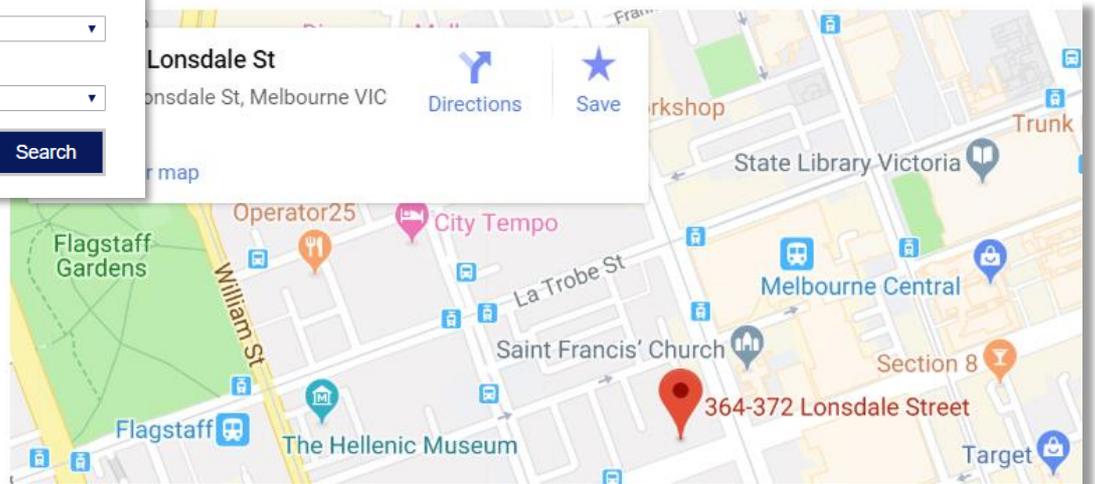
Name

Suburb

Region
Select a Region

Service Type
Select a Service Type

Search



Automated Membership Invoicing

The Centauri Membership Solution provides fully automated membership invoicing allowing you to bill your members monthly, quarterly, annually using popular payment gateways for payments by credit card or direct debit.

The billing function includes the ability for members to pay their membership invoices online via the web portal.

Membership Details		eWay Payment Details	
Joined Date	2/04/2019	Name	<input type="text"/>
Status Reason	Current	Credit Card Number	<input type="text"/>
Renewal Date	2/05/2020	Expiry	<input type="text"/>
Billing Frequency *	Monthly	CVV	<input type="text"/>
Payment Terms *	Credit Card	<input type="button" value="Save Details"/>	
Next Invoice Date	<input type="checkbox"/> 3/06/2019		
Do Not Renew	No		
Member Visit	Yes		

INVOICE

Membership Invoice ☰

Total Amount <input type="checkbox"/> \$188.00	Status * Active	Status Reason UnPaid	Owner * <input type="checkbox"/> Robert Beswick
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Summary

Invoice ID * <input type="checkbox"/> INV-01000-V5J9K7	Invoice Products
Invoice Category * Membership	
Invoice Type * Invoice	
Invoice Date + 6/05/2019	

Product Na...	Properties	Unit	Price Per U...	Q
<input type="checkbox"/> Ordinary Graduate		Primary U...	<input type="checkbox"/> \$188.00	1

Contact Us

To find out more about the Centauri Membership Solution, send us an enquiry at enquiries@centauri.com.au or call us on (03) 9009 9605.