

# xCatalyst

## **catalyst**

*Pronunciation: 'ka-ta-list*

1. An agent that enables a reaction to proceed at a usually faster rate or under different conditions than otherwise possible.

## **xCatalyst**

*Pronunciation: x 'ka-ta-list*

1. An agent for building and maintaining dynamic interactive websites.



**xCatalyst**<sup>TM</sup>  
**PLATFORM**

x C A T A L Y S T P L A T F O R M F O R A S S O C I A T I O N S

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# Website Management System (WMS)

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## Overview

The xCatalyst Website Management System (WMS) is a modular web-based software platform that delivers a complete environment for developing, managing and growing a single website or a network of related websites.

xCatalyst allows you to choose functionality based on your needs and budget. Four core modules work together to provide a complete toolset for building, maintaining and evolving dynamic websites.

xCatalyst empowers a broad range of people to maintain an interactive and feature-rich website. Non-technical and technical users alike will find they can update and manage their organization's web operations through one centralized, easy-to-use application with a web browser and an Internet connection.

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## Website Content Management System (WCMS)

Providing a web presence that communicates and inspires is challenging, but can also seem impossible to accomplish with the tools most organizations have in place today.

The xCatalyst WCMS demystifies web content editing by providing intuitive software tools and automated publishing workflow that creates a seamless and powerful environment for creating, maintaining and evolving website content.

The benefits of adopting a WCMS cut across organizational lines. Employees become more productive, there is a boost in operational efficiencies and the content demands and needs of your online constituents are consistently met.

- **Staging and production environments** allow editors to make content changes without affecting the public website. Content is available on the public website only after it is approved in the staging environment and published to the public website.
- **WYSIWYG (What You See Is What You Get)** rich text content editing enables non-technical personnel to create and update website content without knowing HTML.
- **Version control and archiving** provide backup and disaster recovery capabilities by rolling back to previous versions of an approved page.
- **Granular editing privileges** protect the integrity of the content by defining not only who has access to specific content assets but also the type of access that is permitted.
- **Separation of content and presentation** ensure consistency, enforce branding and make it easy to make periodic website creative updates.
- **SEO (search engine optimization) is easy** with xCatalyst. Meta data (key words, page title and page descriptions) management features provide the ultimate control to ensure your pages are properly indexed by search engines.
- **Integrated site search** allows website visitors to perform key word searches to locate and navigate to the information they are looking for.

- **Global and site specific content sharing** allow content to be shared between sites on a network and between pages on an individual website.
- **Automated content approval workflow** ensures that only approved content and updates are seen on the public website. When content changes are made and the page is checked in, the system sends automated email notifications to approval assignees. Assignees can publish content changes, forward them to additional assignees or send back changes for rework.
- **Multilingual website content management** eliminates the need to maintain an individual website for each language.
- **Section 508 compliance support** features help meet accessibility standards.
- **Dynamic multi-level navigation** support frees content editors from the time consuming tasks associated with maintaining site navigation.
- **The integrated file manager** is a central repository for file-based content assets (images, PDF, documents, flash files). The file manager helps site administrators organize files and ensures that only approved content assets are available to content editors.
- **Page caching technology** ensures website visitors will experience fast loading pages and search engine indexing is optimized.

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## Communication

The Internet has transformed the way organizations communicate with their constituents - forever. Successful organizations have adopted the Web as the cornerstone of their communication strategy – enabling them to meet critical needs, increase their core capabilities and reduce costs.

xCatalyst provides a powerful suite of communication tools that will boost your organization's capabilities to keep your constituents engaged, connected and informed. Tight integration with other xCatalyst modules makes xCatalyst a true enterprise-wide communication solution.

- **Create, schedule and send broadcast email** communication confident that your message will be delivered to the intended recipient and not blocked by SPAM filters.
- **The email list management tools** make it easy to create and manage targeted email lists. Convenient opt out features enable recipients to remove themselves from email lists. Tight integration with the form tool allows respondent emails to be funneled to multiple email lists.
- **Interactive calendars** make it easy for your organization to communicate event information. Create sub-calendars to provide additional collaboration between affinity groups.
- **Create and schedule multiple event notifications** to targeted email lists to assure your event is publicized to all constituents.
- **The dynamic form tool** eliminates time consuming and repetitive tasks associated with creating forms and managing results. Easily create forms and surveys that store results in the database eliminating duplicate data entry. Create personalized auto-replies and automatically route respondents into targeted email lists.
- **The news story and press release management system** simplifies and automates news lifecycle management from release to archiving. The rich text editor allows non-technical people to create news stories. Schedule publication and expiration dates in advance to assure timely delivery and prevent stale content. The system also provides online visitors with the convenience of searching your organization's news archives by key word or category.
- **Web polls** engage website visitors and provide an engaging mechanism for you to promote user interaction. Polls are important because they provide a way for your constituents to share ideas and vote on topics of your choosing.

- **The photo gallery** tool makes creating and maintaining image galleries a snap. The gallery tool eliminates technical hurdles and time consuming image pre-processing for Internet compatibility. Automatically create thumbnails from images as they are uploaded directly from your desktop.
- **Website traffic reports** provide information on how visitors react to your website and will help you understand if your web presence is meeting your constituent needs. xCatalyst includes website traffic analysis reports on demand. Traffic reports can also help measure the effectiveness of your marketing initiatives.

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## Community

Online communities allow members to share a common purpose, need or interest. Building and hosting successful online communities demand specialized and tightly integrated applications that work together to create a complete interactive environment.

xCatalyst Community offers proven interactive applications that enable member-to-member interaction and member content generation. The suite of community applications promotes the exchange of information and ideas. Community features and member management are administered through the command center and integrate with all other xCatalyst modules.

- **Website membership** provides the ability to create member only pages on a website and provides the host organization with the ability to govern and manage community interactions.
- **Member profiles** are created and edited by site administrators. Member profiles can be modified by administrative users eliminating the need for custom programming if member profiles need to change.
- **The online membership directory** enables members to search to find other members they share an interest with. Members update their profile information and control what information is made available to other members.
- **Self service profile updates** and automated login information retrieval minimize hosting organization resources required to keep member information current.
- **Private and public access sub-communities** provide the tools required to create and manage online areas for affinity groups within the membership.
- **Discussion forums** encourage thoughtful dialogue and member to member generated content.
- **Back office community management** provides the tools necessary to manage membership, sub-communities and enforce community policies.
- **Tight integration** with email lists management makes it easy to communicate directly with community and sub-community members.

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## E-commerce

The xCatalyst e-commerce tools can be used in a variety of ways to associate payment with website functions including catalog shopping, donations, event registrations, publication sales and enrollments.

These tools simplify the process of adding ecommerce to your site, allowing people without specialized knowledge to create and manage professional solutions for online transactions.

### Product Catalog

The e-commerce module provides a full featured product catalog and online shopping cart application.

- Mall concept supports multiple storefronts.

- Individual stores include:
  - Creative template
  - Store departments
  - Product information (images, product attributes, description, attributes, etc.)
  - Inventory management
  - Sales reports
- Automated and customized email notifications for different steps in the sales processing cycle.
- Multilingual presentation supported.
- Secure credit card processing (Verisign Payflow Pro payment processing)
- Sales reports

### **Dynamic Forms**

The xCatalyst Dynamic Forms module allows you to create a customized form for your web site. Integrating eCommerce with dynamic forms, allows you to easily charge the customer a fee as the form is submitted. This could be used to accept online donations, offer payment for classes or events, or to charge for membership.

- Real time online credit card processing when form is submitted
- Automatic email notifications internally and to customer
- Easy to add to form – no html required

The Dynamic Form tool allows administrative users to add credit card fields to online forms – instantly enabling online transactions on your website.



# Association Management System (AMS)

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## Overview

The xCatalyst Association Management System (AMS) seamlessly integrates membership, event and continuing education course management with your organization's website. The AMS replaces disparate information silos and inefficient workflows with a centralized database and easy to use software platform.

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## Membership

### Membership Profile

- **Create multiple membership types** as necessary for organizational or individual members.
- **Flexible membership profiles** are easily customized by admin users eliminating the need for custom programming and expensive upgrades.
- **Convenient self-service** profile updates can be made by members via the website. Organizational members can be assigned contact types to limit access to organizational profile to main contacts.
- **End-user defined member contact types** for organizational members (e.g. Main Contact, Financial or Representative).
- **Create public or private website sub-communities** by membership type to enable member to member collaboration and communication.

### Enrollment & Renewals

- **Online or back office membership enrollment and renewals.**
- **Automated email notifications are sent to registrants and to administrative users** when applications are submitted and on application approval (with website login credentials).
- **Membership applications can be reviewed and edited** by admin users prior to processing. Dues can be edited by admin users to enable complimentary memberships and dues prorating.
- **Automated membership renewal notices.** Admin users define when the initial notice is sent and the frequency of subsequent updates.
- **Admin user defined grace periods** and membership expiration business rules.
- **Expired members are automatically removed** from the membership directory and their website login privileges are revoked.
- **Automated reports identify looming renewals and membership expirations** to aid in membership retention efforts.
- **Create and include subscription based services on the enrollment** and renewal application. Subscriptions can be associated with fees and sub-communities.

## Dues & Payment Processing

- **Admin user defined dues** for both individual and organizational member types.
- **Admin users can define fee parameters** including, record type, membership type, fee type and whether or not the fee is published on the public website.
- **Admin user defined payment types (PO, credit card, online checks)** include the ability to specify whether or not the payment type is available on the public website, only for back office processing or both.
- **Secure online credit card processing through Verisign's PayFlow Pro.** Create and send invoices/receipts, process payments, issue refunds, void payments, edit payment information and send email notifications to registrants.
- **Automated email notifications** with payment processing information to designated admin users.

## Committee Management

- Create and manage multiple committees.
- Track an individual's committee participation history.
- Admin user defined committee roles
- Export committee roster to Excel and MS Word formats.
- **Integration with xCatalyst web management system** enables creation and management of committee web pages including automated listing of active committee members.
- Create private or public website committee sub-communities.

## Contact Management

- **Manage contact information** for member and non-member individuals and organizations.
- **Create and track opportunities** associated with company contacts. Schedule activities and track opportunity history.
- **Enable non-members to create and submit a profile** that becomes part of the contact database.
- Search for non-member contacts.

## Membership Directory

- **Online membership directory** with end-user defined search parameters. The membership directory can be public or require a login to search and view.
- **Membership directory report automatically creates an on-demand printable membership directory** that can be exported to Microsoft Word.
- **Expired members** are automatically removed from the directory.
- **Admin user defined profile fields** can be included or excluded from the member directory search or from the member profile.
- **Self-service** member profile updates.
- Member to member discounts.
- **Admin users can customize member profile templates** that control profile presentation on the website.

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## AMS Communication

- **Create and save email lists** from easy to use search filters.
- **Rich text WYSIWYG** editor enables non-technical personnel to create HTML or text broadcast email content.
- **Ability to send test emails** to designated email address(s).
- **Personalize email messages** to members and contacts.
- **Preview email list recipients** prior to sending email.
- **Track email communication correspondence to members and contacts.**

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## Events

The xCatalyst event management system provides an easy to use and comprehensive platform for managing your organization's events, meetings and conferences. Seamless integration with the membership and website management system modules streamlines workflows and eliminates bottlenecks.

### Event Creation

- **Intuitive and easy to use back office interface** for admin users to create events.
- **Create multiple event fees** (e.g. students, members, non-members)
- **Automated event posting** to the website management system calendars.
- **Integration with the continuing education catalog** provides the ability to include course registrations for conferences.
- **Event preview** enables admin users to view event page as it will appear on the website.
- **Convenient event cloning** feature allows admin users to create new events from previous events.
- **Sponsor and speaker** information is automatically posted to the event information page.

### Event Registration

- **Member and non-member** registrations are supported.
- **Membership validation** when registrants choose member-only fees.
- **Secure online credit card processing** including refunds and fee adjustments.
- **Automated email notifications** are sent to registrants when they submit their registration.
- **Invoice and receipt** links are generated and emailed to registrants on registration approval.
- **Front end attendee roster (opt in)** so registrants can view who else has registered for the event.

### Event Marketing

- **Rich text WYSIWYG** editor enables non-technical admin users to create and send email announcements.
- **Email broadcasting to email lists.** Excludes email to individuals that are already registered to the event.
- **Template driven event web pages** assure uniform branding and style elements.
- **Event page web address is automatically generated** to include as a link to the event registration page.
- **Integration with WMS** provides the ability to create multiple page event micro-sites to provide additional information (e.g. hotel, reservations, demographic information)

## Event Management & Reporting

- **Generate event rosters** and export data to multiple formats to create attendee lists and name badges.
- **Dual event registration approval modes** include automatic registration approval on submission or can require admin user approval before the registration is processed.
- **Easily generate event reports including:**
  - registration
  - financial
  - function
  - sponsorship
  - transaction reports
- **Automated email notifications** to admin users when registrations are submitted and on approval.

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## Continuing Education

- **Create and manage** continuing education course catalog.
- **Track registrant course history** and CEUs in contact or member profile.
- **Admin user defined course categories.** Courses can be assigned to multiple categories.
- **Create course description using rich text WYSIWYG** content editor.
- **Create unlimited sessions** with session details including option to flag as new and post to web.
- **Front end registration** and credit card payments.
- **Front end course search** by category and key words.
- **Include course registrations with conference and events.**
- **Preview course** prior to posting on website.