



BEAT ERP FEATURES AND DEVELOPMENT ROADMAP

Last Updated: 26 June 2017

1. BEAT Software

The BEAT solution is very dynamic and agile – making it easy to fit the software around the organization and not the other way around. It has many features that can enhance user experience and lower the barriers for people. Key functionality can include:

- Workflows and CRM functionality to maintain and manage individual and corporate contacts, including unlimited custom fields (even per person), history, notes, email functionality
- Task Management
- Integration with campaign manager to send out mass emails and e-newsletters
- Workflows to trigger SMS and email reminders regarding bounced payments
- Complex Forms, Registrations and Ticketing
- Customer/Member tools including customer/member logins to see payment history, registrations, maintain contact details and subscriptions including regular Credit Card and Direct Debit (depending on your chosen merchant facility) payments
- Custom form builder including reporting and analytics
- Full System accessible from mobile, tablet and desktop devices
- Ability to integrate with Xero for batch payments and automation and reporting of required payouts
- A full list of current functionality is attached alongside this proposal.

Notes:

BEAT ERP system is a custom built app will allow capability for more custom development and to link into other custom software or APIs as required (quoted upon individually).

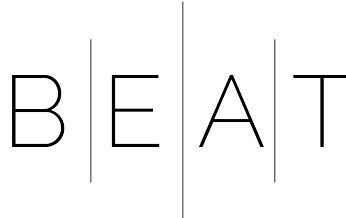
Why invest in a CRM/ERP

Manage your connections more effectively

- Centralise database of contacts (staff, customers, contacts, businesses etc)
- Customised fields
- Track history of interactions
- Manage mailing lists and campaigns including email, SMS and mail
- Assist staff to work together by coordinating contacts
- Compile analytic and survey data for management decision making

Leverage technology to be more efficient

- Integrate with existing processes and services
- Reduce administration requirements
- Automate and enforce policies and procedures
- Document workflows and inductions
- Enable staff to work cooperatively
- Reduce duplication of data entry for financial transactions by integrating with financial packages



Security and Accessibility

- Hosted in Australia, meets security standards including access permissions and encrypted data
- Interactions are logged and audited
- Disaster recovery and backup solutions
- Measurable KPIs, 99.9% uptime guaranteed
- Accessible anywhere from any device

CURRENTLY AVAILABLE FEATURES LIST

Modules

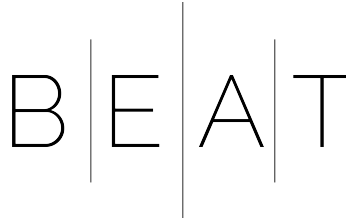
- CRM
 - o Manage people and organisations with unlimited custom fields
 - o Define relationships to segment people and organisations with custom fields
 - o Define groups and links between people and organisations with custom definitions
 - o Track leads and opportunities
 - o Track all interactions with people and organisations
 - o Create and store unlimited notes (include secure\private notes) including attaching files, categorising and tagging
 - o Phone manager capable of tracking incoming and outgoing calls, recording calls and transcribing calls (**Fees apply)
 - o Email Communication using custom email layout and WYSIWYG editor
 - o SMS via Worldwide number availability
 - o Postage labels printing and bulk communication via email and sms
- Task Manager
 - o Create and assign tasks optionally within defined projects with custom tags and priorities
 - o Link to people and organisation notes
 - o Dashboard and Email reminders
 - o SMS reminders
 - o Calendar view of tasks and projects
 - o Attach files to tasks
 - o Track work completed on tasks
- Workflow Manager
 - o Define custom processes with steps and conditional routing
 - o Define custom triggers based on activity and data values
 - o Define schedules for workflows to run
 - o Perform custom actions including notifications (email, sms) and value updates
 - o Track progress of a defined process
 - o Enhanced Workflow with Sales and Marketing automation
- Finance and Payments
 - o Credit card payments online
 - o Cash payments via administration tools
 - o Refund management
 - o Invoicing including GST, non-GST and DGR invoices



- o Custom designed invoices
- o Product\Services\Donation manager
- o SMS custom link to payment with prefilled forms
- o Support account & tracking codes for accounting and reporting
- o Integration with Payment Gateways and Accounting (see below)
- Events
 - o Create and manage events including custom ticket types, availability and pricing
 - o Create ticket types that are hidden until coupon code applied
 - o Issue PDF tickets via email
 - o Ticket printing
 - o Payment processing and integration
 - o Automatic check-in on iOS, Android and Desktop using QR code
- Donor Management
 - o Donor ability to login and view invoices and statements
 - o Donor change password and update information
 - o Donor manage own subscriptions
- Peer to Peer Fundraising
 - o Fundraisers create individual and team pages
 - o Pre Built design templates
 - o WYSIWYG page editor
 - o Facebook-style 'wall' with support messages and updates
 - o Integrates with social media outlets (Facebook, Twitter, Instagram, etc...)
 - o Gamified fundraising goal and target setting
 - o Prize collection tool including ordering
 - o Embed on any website
 - o Optionally Integrates with Events manager
- API for external access to database and tools
 - o RESTful OAuth JSON API
 - o Supports People, Organisations and Finance

Administration Tools and Infrastructure

- Secure Australia and Optional Worldwide Server Hosting
 - o 99.9% uptime monitored 24/7
 - o Multiple distributed servers monitored 24/7
 - o Full backup and disaster recovery
 - o Insurance against cyber attacks
 - o Protected by SSL, firewalls, antivirus\malware detection and malicious attack prevention
 - o Help and support system with in-country support staff
- Password protected with highest industry encryption of data in transit and at rest
 - o Enforced strength requirements
- Access Restrictions for Setup, Modules and Sensitive Data
- Basic and Custom Reporting



- o Report against all database segments (including custom fields, relationships and links) for individuals, organisations, notes, tasks and events.
- o Custom built reports as specified in onboarding process
- Migration and Import Tool
 - o CSV upload of people, organisations, relationships, links, tasks
 - o Copy and paste from Excel
 - o Sterilise import data and review during import
 - o Define new\custom fields during import

3rd Party Integration

- Xero Integration
 - o Synchronise customers, products and invoices
 - o Synchronise product, account, tracking (i.e. cost centres) and tax codes
 - o Dashboard with real-time finance data
 - o Reconciliation function to back-sync from Xero and resolve conflicts
 - o End of year reporting including Tax Deductible Giving Statements
- Stripe Integration
 - o Take payments via stripe in a PCI Compliant secure system
 - o Setup subscriptions via stripe
 - o Trigger payments on known customers
- SurveyMonkey Integration
 - o Add people and segments to survey
 - o Automatically trigger surveys
 - o Report survey findings in people view
- Mailchimp Integration
 - o Automatically synchronise all people with Mailchimp
 - o Synchronise segments as groups in Mailchimp
 - o Add people to custom Mailchimp groups
 - o View campaigns in People View including analytics
 - o Reliable and scalable delivery via campaigns
 - o Supports automation into custom triggers
- S3 Storage Integration
 - o Custom built high availability unlimited storage (**Amazon fees apply)
 - o Granular secure profiles to restrict and audit access – create user credentials to allow limited access to files and folders
- Google Apps Integration
 - o Google Apps authentication (same sign on)
 - o Google Tasks Integration – sync Projects and Tasks to Google
 - o Appointments and Calendar Integration incl. sending calendar invites within appointments module
 - o Google Contact Sync
 - o Email Integration with interactions



- o Google Drive Storage Integration
 - Make personal drives and shared folders available within people and organisations
- Dymo Labelwriter Print
 - o Print mailing labels
 - o Print event labels including name tags

COMING SOON (MAY-JULY 2017)

Modules

- Enhanced Security (granular field level security of all data based on user groups)
- Content Management System (CMS) Integration – October CMS

Administration Tools and Infrastructure

- API support for events module
- 2 Factor Authentication
- Enhanced Reporting and Query Builder (build own custom reports)
- Enhanced Form Builder (build own custom forms)

3rd Party Integration

- Jotforms Integration
 - o Collect information in and form layout
 - o Access information in people and organisation views
 - o Use workflows to store data from Jotforms within Database
- Paypal Integration
- Shopify Integration

FUTURE PLANNING (JULY-DEC 2017)

Modules

- CMS Tool for custom build websites

Administration Tools and Infrastructure

- Office 365 authentication (same sign on)



3rd Party Integration

- Office 365 Integration (including contacts, calendar, tasks and OneDrive)
- MYOB Online integration for Xero feature set
- Australia Post Parcel API
- Australia Post Bulk Mail API