



## Cobalt Membership Dynamics Portal Trial

Welcome to Cobalt's Membership Dynamics Portal Preview! On this site you'll get a preview of Cobalt's Membership Dynamics product and the customer facing components we call Web Elements. We hope you like what you see :)



[Login and Account Setup](#) | [Member Profile](#) | [Apply for Membership](#) | [Event Calendar](#) | [Meetings and Webinars](#) | [Contact Us](#)



Cobalt Membership Portal Preview



### Membership Management

Membership Dynamics can accommodate any number and combination of member types and subtypes; offer unlimited query-based billing periods, fees, and dues renewal options; streamline your applications process; and customize and automate renewal notices and invoices.



### Meetings and Events

Manage meetings of all sizes — from massive trade shows to receptions. Features include customizable registration forms; one-click access to event registration; varied pricing for different customer segments; waitlist with auto updates; group registrations with a single transaction; and registration cancellation with date-driven fees.

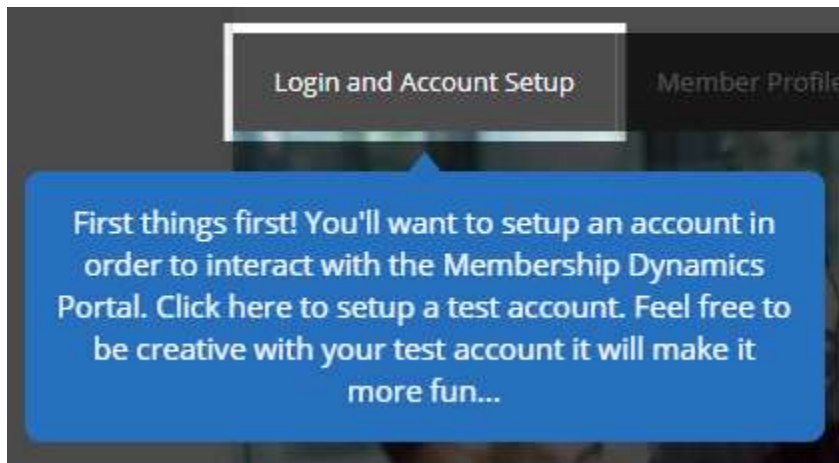


### E-Commerce and Payments

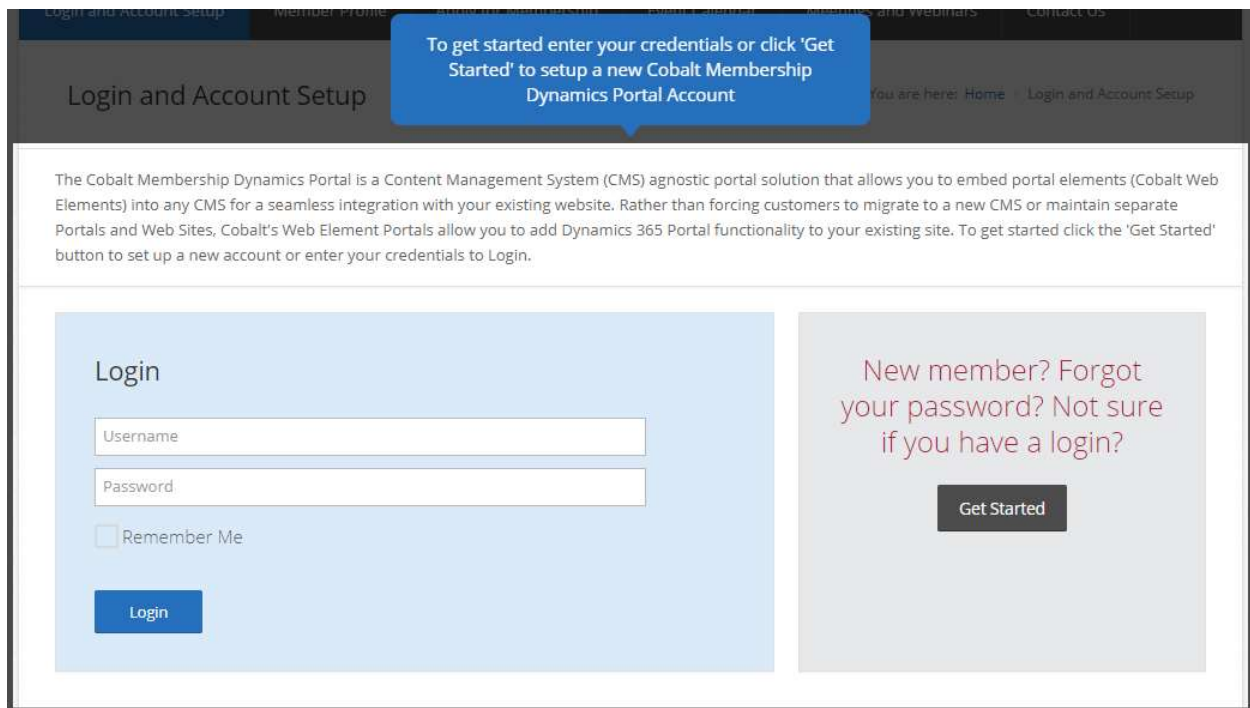
E-commerce functionality is tied to our meeting, education, and subscription modules. You'll be able to process credit card payments and refunds in real time, both from the CRM and the customer portal; manage tax and shipping; schedule payments; set up a complete online store; and complete bulk processing of payments.

All the content on the preview portal was created using Wordpress Content Management System (CMS) and Cobalt's Web Elements. Cobalt's Web Elements are a CMS agnostic Dynamics 365 portal solution that allows you to surface data and e-commerce processes directly on your website. Cobalt's Web Elements are responsive just like your website which means anything you see will render beautifully on any device. Go ahead and give it a try.

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To get started click the Login and Account Setup Menu Item.



The Cobalt Membership Dynamics Portal is a Content Management System (CMS) agnostic portal solution that allows you to embed portal elements (Cobalt Web Elements) into any CMS for a seamless integration with your existing website. Rather than forcing customers to migrate to a new CMS or maintain separate Portals and Web Sites, Cobalt's Web Element Portals allow you to add Dynamics 365 Portal functionality to your existing site. To get started click the 'Get Started' button to set up a new account or enter your credentials to Login.

## Login and Account Setup

You are here: [Home](#) > Login and Account Setup

Cobalt's Membership Dynamics ensures the integrity of the data created by portal users in Dynamics 365. From this page you can enter your email and the portal will verify if a contact in the system already exists with the same email address. If it does the user will be asked if they want to reset their password which will send a secure email to the address entered. If the email address doesn't exist in the system the user will be prompted to setup a new account ensuring users cannot register duplicate accounts and maintaining the integrity of the data in Dynamics 365.

E-mail

[Back](#)[Continue](#)

Cobalt's Membership Dynamics ensures the integrity of the data created by portal users in Dynamics 365. From this page you can enter your email and the portal will verify if a contact in the system already exists with the same email address. If it does the user will be asked if they want to reset their password which will send a secure email to the address entered. If the email address doesn't exist in the system, the user will be prompted to setup a new account ensuring users cannot register duplicate accounts and maintaining the integrity of the data in Dynamics 365.

## Login and Account Setup

You are here: [Home](#) > Login and Account Setup

Cobalt's Membership Dynamics profile setup is fully configurable to collect as much or as little information from a user during the account setup process. However, there are a few pieces of information that are required for any user that is registering for a new account. On this page we will collect the minimum amount of demographic and credential information required to create a new contact record in Dynamics 365.

Prefix [optional]

Last Name

First Name

Suffix [optional]

Middle Name [optional]

E-mail Address

Password

Confirm E-mail Address

Confirm Password

[Cancel](#)[Continue](#)

## Login and Account Setup

You are here: [Home](#) > [Login and Account Setup](#)

Cobalt's Membership Dynamics profile setup is fully configurable to collect as much or as little information from a user during the account setup process. On these pages you can ask for additional contact information to fill out a user's profile and provide more information for your organization to engage with your members. Don't want the profile setup process to be too lengthy? You can configure Membership Dynamics to only collect the minimum amount of information necessary and ask users for this information once they are registered.

Home [optional]

United States ▼

555-555-5555

Business [optional]

United States ▼

Cell [optional]

United States ▼

Back

Cancel

Continue

Membership Dynamics profile setup is fully configurable to collect as much or as little information from a user during the account setup process. However, there are a few pieces of information that are required for any user that is registering for a new account. On this page we will collect the minimum amount of demographic and credential information required to create a new contact record in Dynamics 365. Once you've completed the profile setup you will be taken to the new member dashboard.

[Login and Account Setup](#)
[Member Profile](#)
[and Webinars](#)
[Contact Us](#)

This is your member dashboard. This page will update you with the latest information regarding their membership. Pro Tip: Since this page is protected you'll see the login and account setup page if you aren't logged in yet.

You are here: [Home](#) > [Member Profile](#)

Welcome to your member dashboard! The Membership Dynamics Preview portal contains just a few of the out-of-the-box elements available for Dynamics 365. In this preview portal you'll be able to test drive the customer facing Membership and Meetings functionality including integrated e-commerce. If you have any questions send us a note [sales@cobalt.net](mailto:sales@cobalt.net).

Click or drop an image here to update your photo.

**Mr. Michael Ochs**  
 10 Prince St.  
 Alexandria, VA 22314

Update Your Member Profile

**Become a Member**  
 You are not currently a member. Click Apply for Membership to join now!

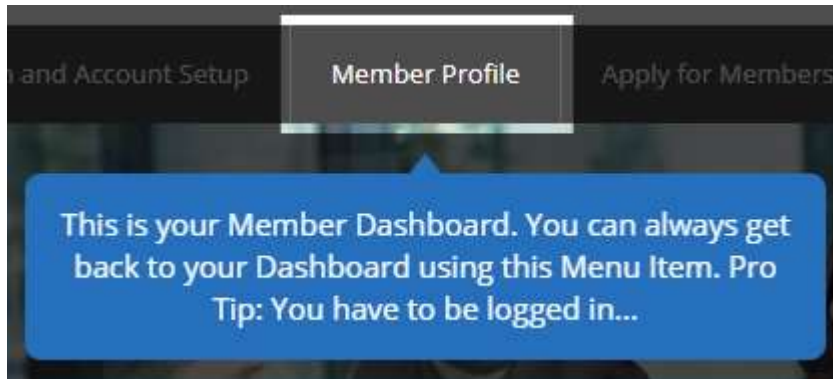
Apply for Membership

**Cobalt Web Elements Webinar**  
 Saturday, December 2, 2017 (8:00 AM to 10:00 AM)  
 Cobalt has developed a robust portal solution that leverages our web element technology allowing you to embed dynamic elements that push and pull data from Dynamics 365/CRM inside of your existing web site.

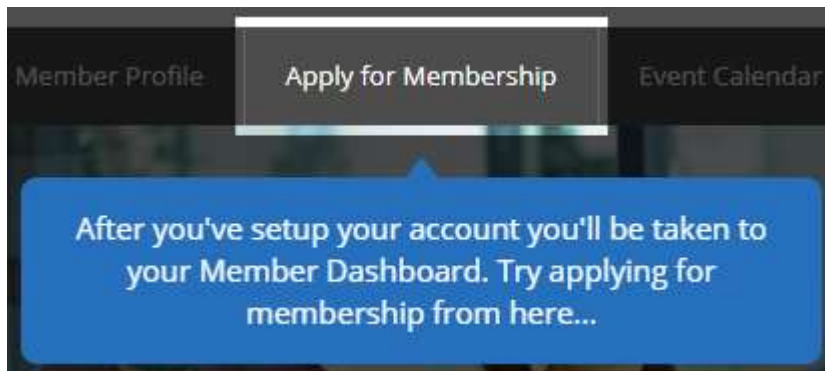
Calendar

Order History

The Membership Dynamics Preview portal contains just a few of the out-of-the-box elements available for Dynamics 365. In this preview portal you'll be able to test drive the customer facing Membership and Meetings functionality including integrated e-commerce. You can always get back to this page clicking the Member Profile menu item in the top navigation.



After you've setup an account you'll want to apply for membership to begin receiving the benefits of membership immediately on the Membership Dynamics portal. Including discounted event registration after successfully completing the membership application process and paying your membership fee. Click the Apply for Membership menu item from the top navigation.



## Apply for Membership

You are here: [Home](#) > [Apply for Membership](#)

Membership Dynamics can accommodate any number and combination of member types and subtypes; offer unlimited query-based billing periods, fees, and dues renewal options; streamline your applications process; and customize and automate renewal notices and invoices. Below is a list of Member Types for which your user is eligible. Pick your member type to begin.

### Member Type

- ☐ Cobalt Student Annual Membership - \$36.00
- ☐ Cobalt Associate Annual Member - \$120.00
- ☐ Cobalt Active Annual Membership - \$240.00

Cancel

Save and Exit

Continue

Membership Dynamics can accommodate any number and combination of member types and subtypes; offer unlimited query-based billing periods, fees, and dues renewal options; streamline your applications process; and customize and automate renewal notices and invoices. Below is a list of Member Types for which your user is eligible. Pick your member type to begin and then answer a few questions regarding your membership application.

## Apply for Membership

You are here: [Home](#) > [Apply for Membership](#)

Membership Dynamics includes a module called forms. The forms module allows an organization to configure their own questions and portal forms to ask users for any relevant information when a user interacts with the portal. The questions you see below are just a sample of the type of information you can collect when a user applies for membership, signs up for a meeting or when the time comes to renew. The flexibility of the forms module gives you complete control over the type of data you collect in Dynamics 365 whether it be marketing data or data pertinent to the application or registration process in order to qualify users eligibility. You have full control over the type of question as well as the required or format validation and text to display all from Membership Dynamics staff interface.

### Tell us a little about yourself...

Have you ever applied for membership before?

Enter your age range

Back

Cancel

Save and Exit

Continue

Membership Dynamics includes a module called forms. The forms module allows an organization to configure their own questions and portal forms to ask users for any relevant information when a user interacts with the portal. The questions you see below are just a sample of the type of information you can collect when a user applies for membership, signs up for a meeting or when the time comes to renew. The flexibility of the forms module gives you complete control over the type of data you collect in Dynamics 365 whether it be marketing data or data pertinent to the application or registration process to

qualify users' eligibility. You have full control over the type of question as well as the required or format validation and text to display all from Membership Dynamics staff interface.

## Apply for Membership

You are here: [Home](#) > [Apply for Membership](#)

Below you can see a summary of your Membership Application order. You can use the following coupon code (MDP10) to see how coupons can be issued for any Membership Dynamics portal process.

Product	List Price	Your Price	Qty	Total
Student Membership Fee	\$36.00	\$36.00	1	\$36.00

Subtotal: \$36.00

Discount: \$0.00

Tax: \$0.00

Shipping: \$0.00

Total: \$36.00

On the application summary page, you'll be presented with a summary of your membership application and fees. You can use the coupon code (MDP10) to see how coupons can be issued for any Membership Dynamics portal process.

## Apply for Membership

You are here: [Home](#) > [Apply for Membership](#)

Ready to pay? Good news you don't have to enter your actual Credit Card Information into the Preview Portal! ;) While Cobalt has available integrations with all major credit card processing services, the preview portal is using a sample payment processor. To process a sample credit card do the following.

1. Choose Visa as your Card Type
2. Enter the following test credit card number (4111111111111111)
3. Enter (123) for the Security Code
4. Enter any future date for the Expiration Date.
5. Fill out the remaining fields and click Continue to preview your order before submitting payment.

Card Type	Security Code (CVV/CV2)
<input type="text"/>	<input type="text"/>
Card Number	First Name
<input type="text"/>	<input type="text"/>
Expiration Date (MM/YYYY)	Last Name
<input type="text"/>	<input type="text"/>

While Cobalt has available integrations with all major credit card processing services, the preview portal is using a sample payment processor. To process a sample credit card, do the following.

1. Choose Visa as your Card Type
2. Enter the following test credit card number (4111111111111111)
3. Enter (123) for the Security Code
4. Enter any future date for the Expiration Date.
5. Fill out the remaining fields and click Continue to preview your order before submitting payment.

After entering your payment information you're ready to submit your membership application. Users can review their payment information and the amount to be charged prior to processing their payment and submitting the application. Cobalt's Membership Dynamics has a robust requirements engine which once an application is submitted will automatically verify a potential members eligibility as well as flag applications for manual audit and/or generate notifications to your staff to review an application prior to granting membership. The preview portal only requires payment and a completed application for membership so once you submit from this screen you will be a member.

## Apply for Membership

You are here: [Home](#) > [Apply for Membership](#)

Congratulations! You've successfully submitted your Membership Application. Below is a receipt of your application and payment which can also be e-mailed automatically to the e-mail address on file for the member logged in to the portal. This feature is disabled in the preview environment so as not to clutter user's inboxes with sample data. Now that you are officially a member head over to the Meetings and Webinars section of the portal to register for an event at the member discounted rate.

### Member Type

Cobalt Student Membership

### Term

1 Year

### Order Details

Product	List Price	Your Price	Tax	Qty	Total
Student Membership Fee	\$36.00	\$36.00	\$0.00	1	\$36.00

Subtotal: \$36.00

Discount: \$3.60

Tax: \$0.00

Shipping: \$0.00

Total: \$32.40

### Payment Summary

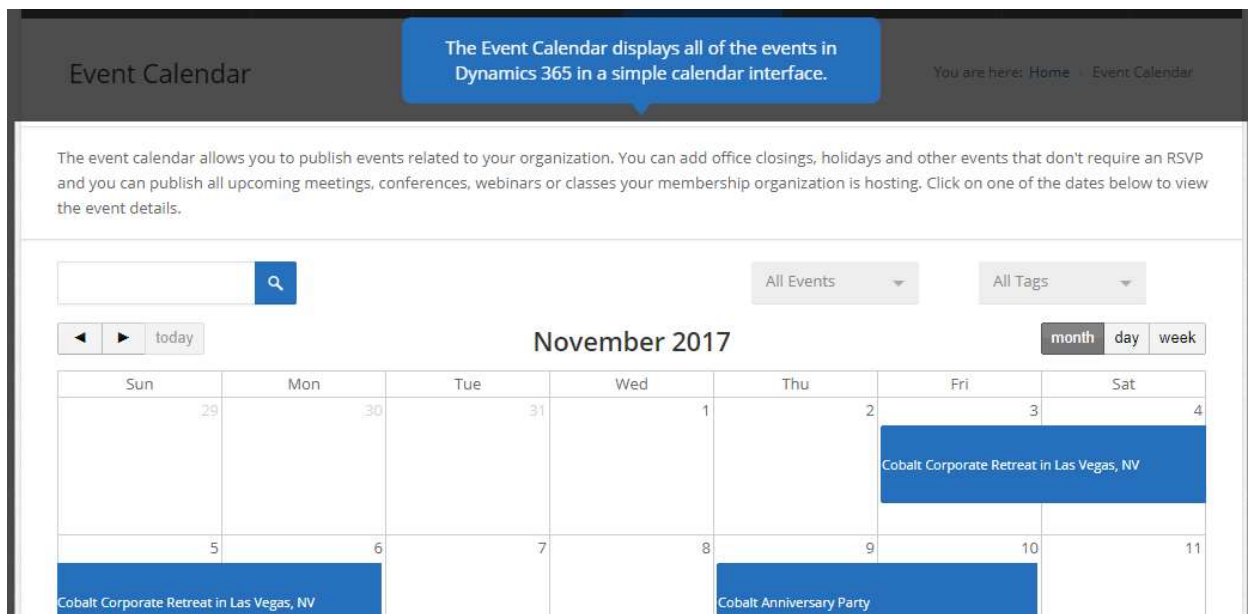
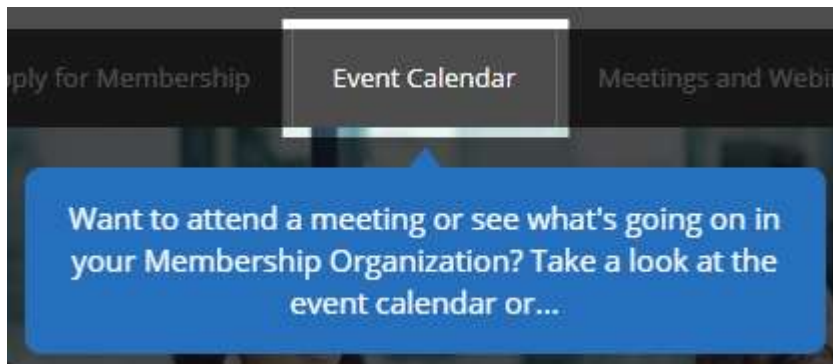
Payment Number	Date	Method	Card/Check Number	Amount
	11/21/2017	Visa	*****1111	\$32.40

Total Payments: \$32.40

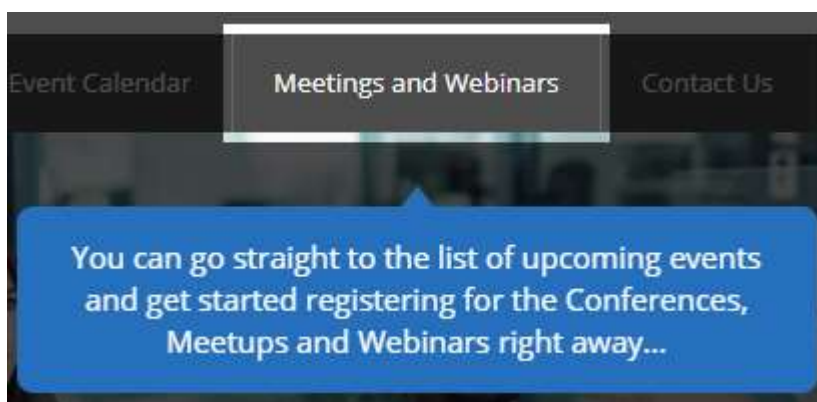
[Close](#)

[Print](#)

That's it. You've successfully submitted your Membership Application. Below is a receipt of your application and payment which can also be e-mailed automatically to the e-mail address on file for the member logged in to the portal. This feature is disabled in the preview environment so as not to clutter user's inboxes with sample data. Now that you are officially a member head over to the Meetings and Webinars section of the portal to register for an event at the member discounted rate. Click on the Event Calendar to view a calendar of upcoming events and meetings.



The event calendar allows you to publish events related to your organization. You can add office closings, holidays and other events that don't require an RSVP and you can publish all upcoming meetings, conferences, webinars or classes your membership organization is hosting. Click on one of the dates below to view the event details.



Otherwise you can go straight to the list of upcoming meetings and webinars by clicking on the Meetings and Webinars menu item.

## Upcoming Meetings and Webinars

You are here: [Home](#) > [Upcoming Meetings and Webinars](#)

Below is a list of upcoming meetings and webinars configured in Membership Dynamics. Users can search for a specific event they are interested in attending and get started registering for the event from this page. If you're logged in you'll see options for One-Click registration for events that don't require the user to provide payment or additional information and this page will also display invite only meetings if you are hosting an event for a select group of individuals. Click on the Details to view specifics of an event.

02 Dec	<b>Cobalt Web Elements Webinar</b> ☹ Saturday, December 2, 2017 (8:00 AM to 10:00 AM) <a href="#">Details</a> <a href="#">One-Click Register</a>
06 Dec	<b>Cobalt Summit User Conference</b> ☹ Wednesday, December 6, 2017 (8:00 AM) to Friday, December 8, 2017 (7:00 PM) 📍 Four Seasons Hotel <a href="#">Details</a>
1	

[Clear Filters](#)  
 Search by Keyword  
 [🔍](#)  
 Filter by Month  
 Any Month [▼](#)

The upcoming meetings and webinars page displays a list of upcoming meetings and webinars configured in Membership Dynamics. Users can search for a specific event they are interested in attending and get started registering for the event from this page. If you're logged in, you'll see options for One-Click registration for events that don't require the user to provide payment or additional information and this page will also display invite only meetings if you are hosting an event for a select group of individuals. Click on the Details to view specifics of an event or register for a meeting with a single click by clicking on the One-Click Registration button.

02  
Dec

**Cobalt Web Elements Webinar**  
 ☹ Saturday, December 2, 2017 (8:00 AM to 10:00 AM)  
[Details](#) [Reserving Your Seat](#)

[Clear Filters](#)  
 Search by Keyword  
 [🔍](#)

## Upcoming Meetings and Webinars

You are here: [Home](#) > Upcoming Meetings and Webinars

Below you can see the details of an upcoming meeting. If you've already logged in you'll be able to see the cost of attending the event on the right-hand side as well as the details of the event on the left. You can add the event to your personal calendar and get started registering right away. Give it a try!

06  
Dec

### Cobalt Summit User Conference

🕒 Wednesday, December 6, 2017 (8:00 AM) to Friday, December 8, 2017 (7:00 PM)

📍 Four Seasons Hotel

Description

Location

Cobalt Summit is the place to meet with fellow Cobalt Membership Dynamics users, and the Cobalt Team. Join us for 2 days of training, feedback and exciting announcements on what's new in Membership Dynamics and Dynamics 365.

#### Registration Details

<b>Summit Executive Track</b>	
Member	\$499.99
Non-Member	\$799.99
<b>Summit User Track</b>	
Member	\$399.99
Non-Member	\$599.99

[Register](#)[Download iCal](#)

If you drill into the details you can see the details of the upcoming meeting. If you've already logged in you'll be able to see the cost of attending the event on the right-hand side, based on your membership level, as well as the details of the event on the left. You can add the event to your personal calendar and get started registering right away. Click register to start the registering.

## Upcoming Meetings and Webinars

You are here: [Home](#) > Upcoming Meetings and Webinars

Below is a list of fees for which you are eligible. Cobalt's Membership Dynamics Fee structure allows for infinite possible configurations giving you the flexibility to target specific Dynamics 365 contacts or groups of contacts that you want to offer discounts to or incentivize to join prior to registering for an event. You can also use fees to package event attendance along with classes, outings, dinners and training to make the registration experience as easy as possible for users. Select a fee to continue with your registration.

- ☐ Summit Executive Track - \$499.99
- ☐ Summit User Track - \$399.99

Cancel

Continue

On the first page of the registration is a list of fees for which you are eligible. Cobalt's Membership Dynamics Fee structure allows for infinite possible configurations giving you the flexibility to target specific Dynamics 365 contacts or groups of contacts that you want to offer discounts to or incentivize to join prior to registering for an event. You can also use fees to package event attendance along with classes,

outings, dinners and training to make the registration experience as easy as possible for users. Select a fee to continue with your registration.

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## Upcoming Meetings and Webinars

You are here: [Home](#) > [Upcoming Meetings and Webinars](#)

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Membership Dynamics includes a module called forms. The forms module allows an organization to configure their own questions and portal forms to ask users for any relevant information when a user interacts with the portal. The questions you see below are just a sample of the type of information you can collect when a user applies for membership, signs up for a meeting or when the time comes to renew. The flexibility of the forms module gives you complete control over the type of data you collect in Dynamics 365 whether it be marketing data or data pertinent to the application or registration process in order to qualify users eligibility. You have full control over the type of question as well as the required or format validation and text to display all from Membership Dynamics staff interface.

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Just a couple of questions before we can register you...

Enter any dietary restrictions you have. [optional]

Enter the name that should appear on your badge.

[Back](#)

[Cancel](#)

[Continue](#)

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Membership Dynamics includes a module called forms. The forms module allows an organization to configure their own questions and portal forms to ask users for any relevant information when a user interacts with the portal. The questions you see below are just a sample of the type of information you can collect when a user applies for membership, signs up for a meeting or when the time comes to renew. The flexibility of the forms module gives you complete control over the type of data you collect in Dynamics 365 whether it be marketing data or data pertinent to the application or registration process to qualify users' eligibility. You have full control over the type of question as well as the required or format validation and text to display all from Membership Dynamics staff interface. You can also ask different questions based on the fee the user selected on the previous page and map data directly to and from a user's profile.

## Upcoming Meetings and Webinars

You are here: [Home](#) > Upcoming Meetings and Webinars

Below you can see a summary of your Meeting Registration. You can use the following coupon code (MDP10) to see how coupons can be issued for any Membership Dynamics portal process. From here you'll be prompted to enter your credit card payment information or based on your business rules you can configure the system to allow for applications to be submitted and paid either by check or anytime from your My Orders page.

Registration | [Edit](#)

### Summit User Track

Product	List Price	Your Price	Tax	Qty	Total
Summit Attendee Fee	\$599.99	\$399.99	\$0.00	1	\$399.99

Subtotal: \$399.99

Discount: \$0.00

Tax: \$0.00

Shipping: \$0.00

Total: \$399.99

Your total savings was \$200.00.

You're almost ready to submit your registration. Here you'll see a summary of your Meeting Registration. You can use the following coupon code (MDP10) to see how coupons can be issued for any Membership Dynamics portal process. From here you'll be prompted to enter your credit card payment information or based on your business rules you can configure the system to allow for applications to be submitted and paid either by check or anytime from your My Orders page. Continue through the next page until you get to the payment page.



## Upcoming Meetings and Webinars

You are here: [Home](#) > [Upcoming Meetings and Webinars](#)

At this point you're ready to submit your meeting registration. Users can review their payment information and the amount to be charged prior to processing their payment and submitting the application. Ready to attend the meeting? Click Submit Payment below.

Attendee	Registration
<a href="#">Mickey Ochs</a>	Summit User Track

Product	List Price	Your Price	Tax	Qty	Total
Summit Attendee Fee	\$599.99	\$399.99	\$0.00	1	\$399.99

Subtotal: \$399.99

Discount: \$40.00

Tax: \$0.00

Shipping: \$0.00

Total: \$359.99

Your total savings was \$200.00.

Mike Ochs

Visa

\*\*\*\*\*1111

Exp. 03/2019

10 Prince St.

Alexandria, VA 22314

United States

[Back](#)

[Cancel](#)

[Submit Payment](#)

One final check that all your details are correct and you're ready to submit your registration. Users can review their payment information and the amount to be charged prior to processing their payment and submitting the application. Ready to attend the meeting? Click Submit Payment to complete your registration.

## Upcoming Meetings and Webinars

You are here: [Home](#) > [Upcoming Meetings and Webinars](#)

Congratulations! You've successfully submitted your Meeting Registration. Below is a receipt of your registration and payment which can also be e-mailed automatically to the e-mail address on file for the member logged in to the portal. This feature is disabled in the preview environment so as not to clutter user's inboxes with sample data.

### Cobalt Summit User Conference: 12/6/2017 8:00 AM - 12/8/2017 7:00 PM

Attendee	Registration
Mickey Ochs	Summit User Track

### Order Details

Product	List Price	Your Price	Tax	Qty	Total
Summit Attendee Fee	\$599.99	\$399.99	\$0.00	1	\$399.99

Subtotal: \$399.99

Discount: \$40.00

Tax: \$0.00

Shipping: \$0.00

Total: \$359.99

Your total savings was \$200.00.

Payment Number	Date	Method	Card/Check Number	Amount
	11/21/2017 5:39 PM	Visa	*****1111	\$359.99

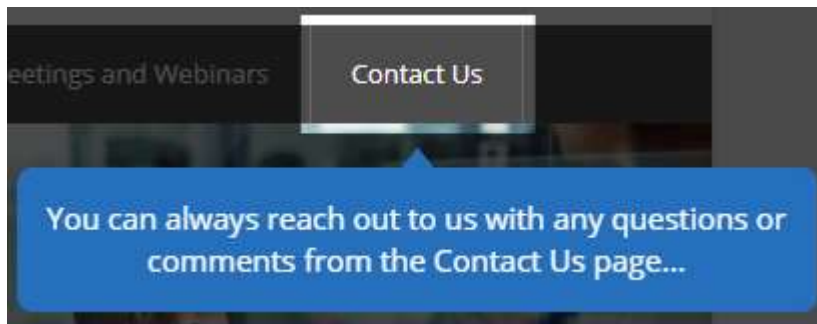
Total Payments: \$359.99

[Download iCal/ICS](#)
[Print](#)
[Return](#)

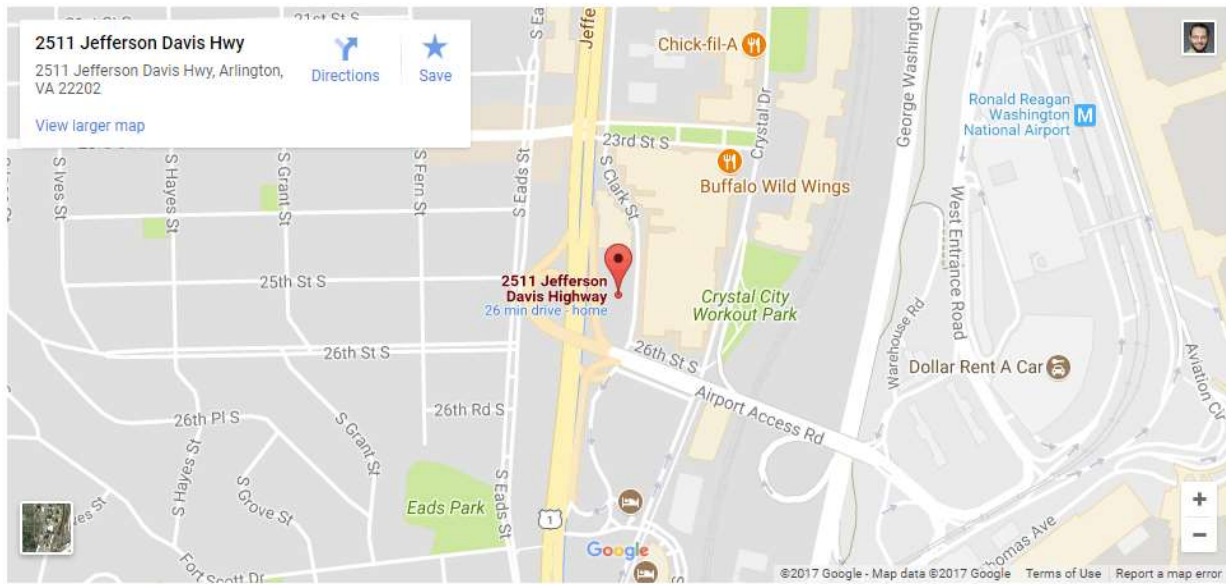
We'll see you there! Not really, again this is only a preview portal, but this is what your members would see after they've registered for a meeting or webinar. This receipt can also be e-mailed automatically to the e-mail address on file for the member logged in to the portal. This feature is disabled in the preview environment so as not to clutter user's inboxes with sample data.

### Ready to get started with Membership Dynamics?

We've made that easy too. Click on the Contact Us in the preview portal and send us a note. The Contact Us page is a standard Wordpress form to contact Cobalt's sales team. Another example of best of breed applications working together to make great membership experiences for your members.



Feel free to send us a note or provide any feedback you have on the Membership Dynamics Preview Portal. We're all ears!



## Contact Form

Feel free to send us a note or provide any feedback you have on the Membership Dynamics Preview Portal. We're all ears!

Name: \*

Email: \*

Message: ✖

Send Message