

Kentico in a Membership World



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Logistics

- Presenting in-person and via webinar
- Webinar Q & A is being monitored
- Minnesota will have a live discussion post-webinar
(hoping others will in the future as well)
- I'm wearing a headset, Tony Robbins style!

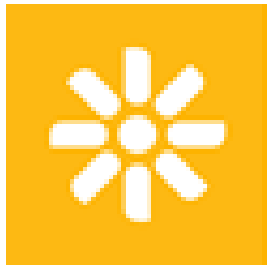
About me

- From the great state of Alaska (live in Minnesota now)
- Background in Sports Medicine
- Master Degree in Instructional Design
- Started out as a technology consumer
- User Experience expert
- Speak about 15-20 times per year
- Been building websites since 1998
- Working with Kentico since 2005

About High Monkey

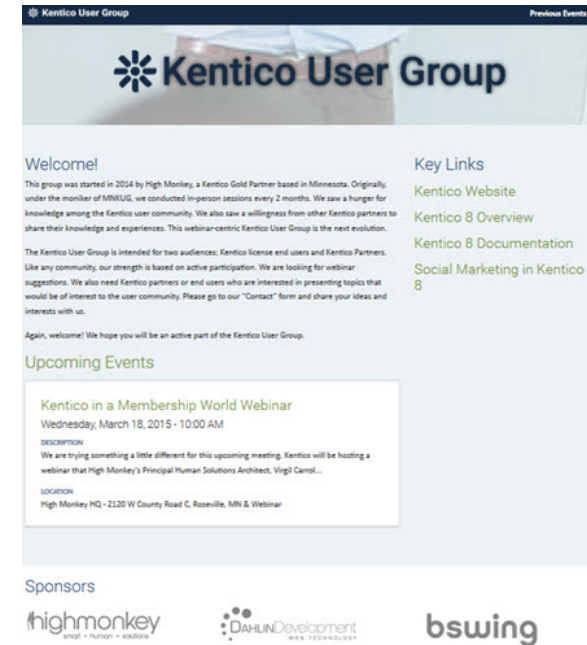
- Kentico User Group sponsor
- Key areas: Web/CMS, SharePoint & UX
- Been around for 17 years
- Clients all over the world

Kenticousergroup.org



Kentico
Gold Partner

- www.Kenticousergroup.org
- Launching Kenticousergroup.org
- Continue on with bi-monthly events
- Collaboration space for the Kentico Community



THE CASE

Automation Alley®
Technology's Matchmaker for Business®

MEMBERSHIP PROGRAMS & SERVICES NEWS EVENTS JOB BOARD ABOUT US THE FUND BLOG

Automation Alley is a technology business association & accelerator dedicated to growing the economy of Southeast Michigan

MEMBER PACKAGES JOIN NOW DONATE

DEFENSE & MANUFACTURING INTERNATIONAL BUSINESS ENTREPRENEURIAL TALENT DEVELOPMENT PRODUCT LIFECYCLE MANAGEMENT

14th Annual Awards Gala

Farnborough International Airshow

Automation Alley Trade Mission To Farnborough International

Farnborough, England | July 12-17, 2014

FEATURED EVENTS

MAY 13 Automation Alley Orientation 8:00AM | Troy

MAY 24 Growing Your Business Through Exporting Tips to Get Started 5:00PM | Detroit

SEPT 12 Automation Alley 14th Annual Awards Gala 8:30AM | Troy

OCT 15 Education and Workforce Committee Meeting 8:00AM | Troy

WHAT'S HAPPENING

SUBSCRIBE

Automation Alley's Innovation Award for Advanced Manufacturing June 18, 2014

Automation Alley to lead trade mission to the U.K.'s Farnborough International Airshow with 9 local organizations June 13, 2014

Automation Alley welcomes 19 new member organizations in May June 3, 2014

Registration opens for Automation Alley's 14th Annual Awards Gala June 3, 2014

Automation Alley awarded \$15,000 to provide business accelerator services to Tome Inc. June 3, 2014

FOUNDATION MEMBERS

Microsoft

Blue Cross Blue Cross of Michigan

MICHIGAN WORKS! OAKLAND

OAKLAND COMMUNITY COLLEGE

Johns Hopkins University

The client

- Formed in 1998 to help promote technical workforce development in the Detroit Metro area
- Have over 1000 member companies to service
 - Multiple membership tiers with benefits tied to each level
 - Could need 1 - ?? admin users
 - Needed unlimited member visitor logins to take advantage of benefits
- Services both member and organization events & press releases
- Provides multiple avenues of services to both new and existing businesses

Their business pain

- Old website system could not be easily changed (*built on Salesforce – their website was built on an old version*)
- Design was outdated
- Most membership processes were handled manually
- Changed membership benefits packages but could not update site
- Wanted to support recurring membership dues billing
- Complex process for members to submit content and be added to the site

What Kentico brought to the table

- Modern CMS interface (version 8.1)
- Extensible e-commerce system
- Ability for separation of content and presentation (VERY IMPORTANT)
- Out of the box modules / web parts
 - Content contribution
 - Event Booking
 - Newsletter integration
 - Workflows

THE SOLUTION

Project challenges

- Flexible, responsive design to adapt to screen size vs. device
- Balance use of complex code / Kentico out of the box (OOTB)
- Need to share content across multiple channels
 - Links throughout site
 - Share news in daily newsletter
- Focus on visitors and admin edit experience

The Kentico OOTB challenges

- Membership product type tied to person, not organization
 - needed one-to-many relationships
- Both paid / free events (and pricing is based what 'type' of user you are)
- Complex membership application that needed to be updated by client staff (without having to update automated processes)
- Needed payment provider that supported recurring payment model

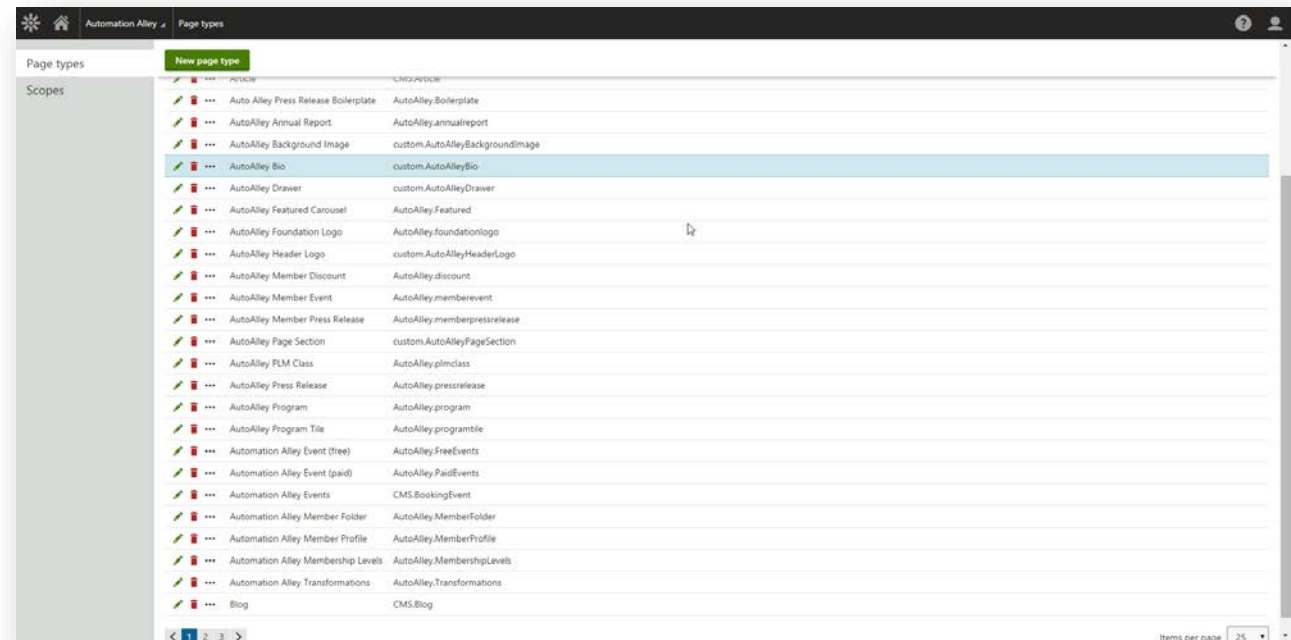
The solution

- Leverage as much OOTB as possible
 - Custom page types
 - Modules
 - Newsletter
 - Events
 - Blog
 - E-commerce
- Extended Kentico API to meet specific project needs
- Use Macro model to create flexible permissions structure

CONTENT

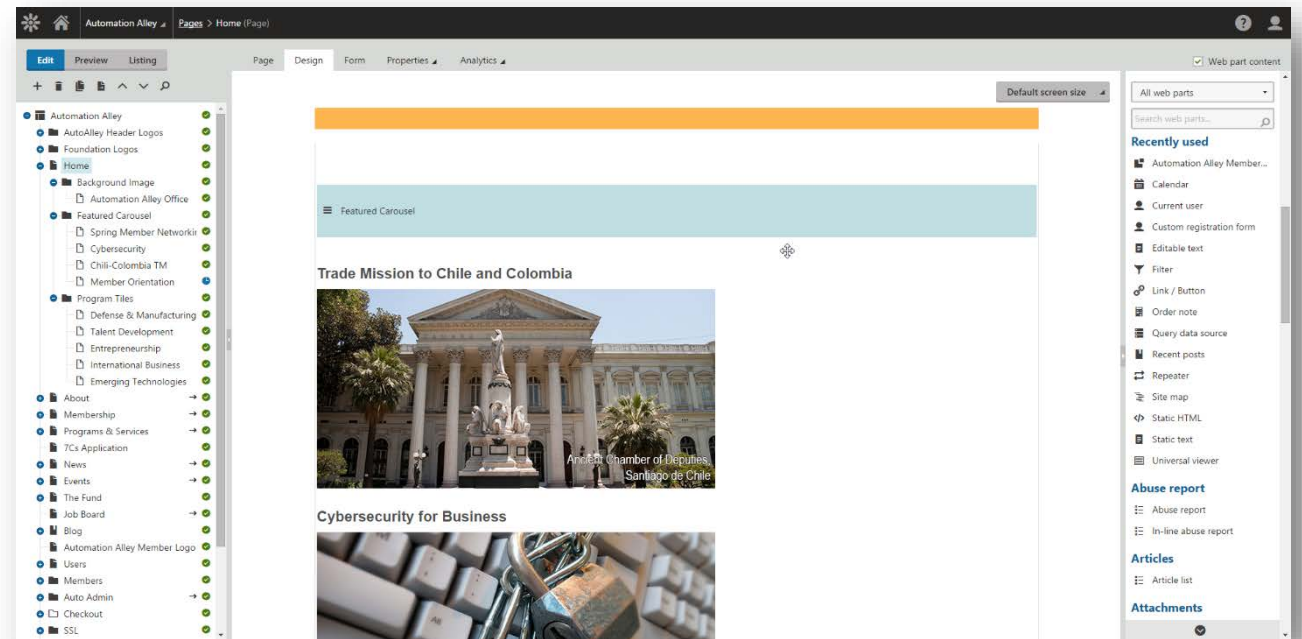
Leverage OOTB – Custom page types

- Created page types to map metadata to different types of content
- Allows for more flexibility in the future (not build into a box)



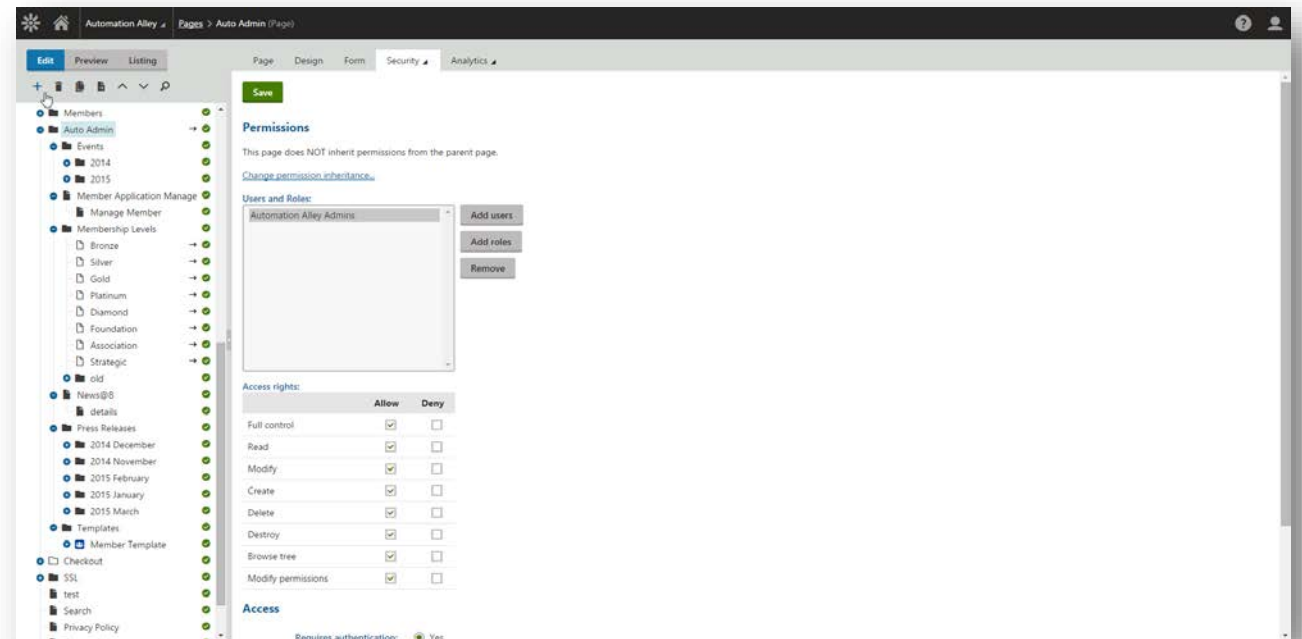
Leverage OOTB – Content rollup

- Segment out content for ease of management
- Use repeater controls to rollup
- Facilitates content re-use



Leverage OOTB – Content admin

- Provide subsection for client content admin
- Holds templates for automated processes



MEMBERSHIP

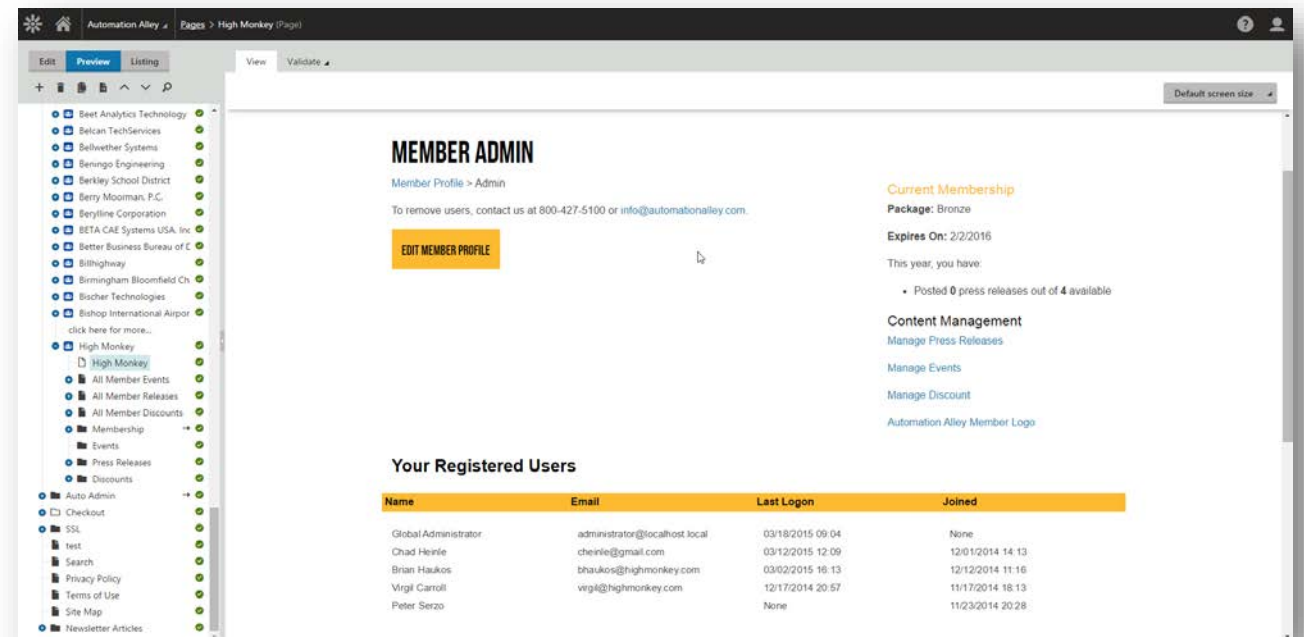
Leverage OOTB – Membership

- Tied new 8.0 Forms module to payment process
 - Bypassed e-commerce system
 - Leveraged form events

The screenshot shows a web form titled "MEMBERSHIP APPLICATION" within a design tool interface. The form is divided into sections: "Primary Contact" and "Billing Info". The "Primary Contact" section includes fields for Company Name, Salutation, First Name, Last Name, Title, Phone, and E-mail Address. The "Billing Info" section includes a Street field. The design tool interface includes a sidebar with a navigation tree, a top menu with options like Edit, Preview, Listing, Page, Design, Form, Properties, and Analytics, and a toolbar with buttons for Save, Spell check, and Apply workflow.

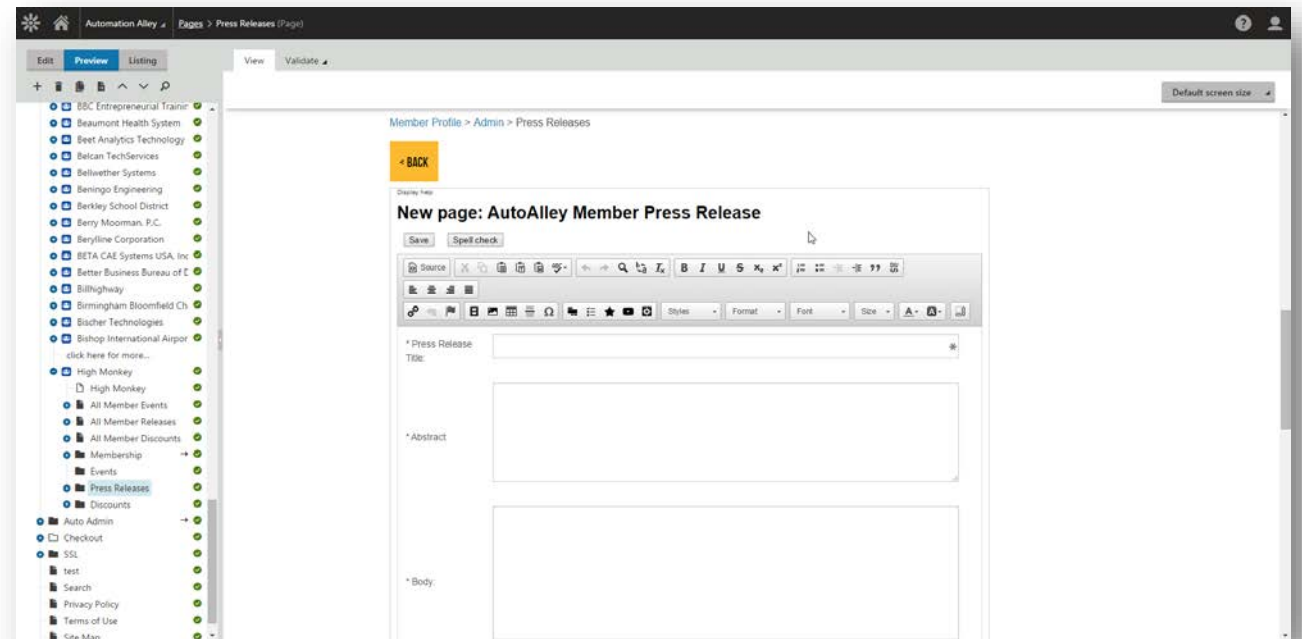
Leverage OOTB – Membership

- Used content contributor webpart extensively
- Rolled up membership record stats



Leverage OOTB – Membership

- Members submit content
- Client approves content



Leverage OOTB – Membership

- Used Page structure as template
- Used API to copy upon approval by client

The screenshot displays a web application interface with the following components:

- Navigation Menu (Left):** A tree view showing folders like 'Auto Admin', 'Events', 'Member Application Manager', 'Membership Levels', 'Press Releases', and 'Templates'. Under 'Templates', there is a 'Member Template' folder containing 'Member Template', 'Membership', 'Events', and 'Press Releases'. Green checkmarks are visible next to several items.
- Form (Top Right):** A form titled 'Member Address' with fields for 'Sub Industry:' (Advanced Ma...), 'Primary Products:', and 'Header Image:' (Choose File).
- Members List (Bottom):** A list of members including 'High Monkey', 'Low Monkey', 'Big Monkey Business', and 'Great Business'. Under 'High Monkey', there is a 'Membership' folder containing a '2014' folder with several press releases listed with dates and titles, each with a diamond status icon.
- Settings Panel (Right):** A panel with sections for 'Level Settings' (Price, Membership valid starting, Membership expires on) and 'Level Tracking' (No of Press Releases Used, Member ID).

Leverage OOTB – Membership

- Tracked membership benefits by unique yearly record
- Used workflow to increment benefit usage on Publish
- Tied to payment provider webhooks

The image displays two screenshots of a membership management interface. The left screenshot shows the configuration for a 'Gold' membership level, and the right screenshot shows the configuration for a 'Silver' membership level.

Gold Membership Configuration:

- General:** Name: Gold, Level Name: Gold
- Level Benefits:** No of Press Releases Allowed: 0, Able to post events:
- Level Settings:** Price: 1500, Membership valid starting: [empty], Membership expires on: [empty]
- Level Tracking:** No of Press Releases Used: [empty], Member ID: [empty]

Silver Membership Configuration:

- General:** Name: 2014, Level Name: Silver
- Level Benefits:** No of Press Releases Allowed: 8, Able to post events:
- Level Settings:** Price: 650, Membership valid starting: 11/5/2014 (Today), Membership expires on: 11/5/2015 (Today)
- Level Tracking:** No of Press Releases Used: 5, Member ID: [empty]

Macros – Membership management

- Only certain users can manage each member (but member may have more users)
- Once member levels have been reached, cannot create more

The screenshot displays the 'MEMBER ADMIN' interface. A 'Security' dialog box is open, showing various permission settings. The dialog has a title bar 'Security' and several configuration options:

- Check permissions:**
- Insert requires page type permission:**
- Allow insert:** with a dropdown menu showing the macro `{% HMMacro.MemberHasReleaseCount(CurrentDoc`.
- Allow edit:**
- Allow delete:**
- Allow editing by users:** with a dropdown menu set to 'Authenticated'.

In the background, the 'MEMBER ADMIN' page is visible, featuring a 'Back to Profile' link and a yellow 'Edit Member Profile' button.

EVENTS

Leverage OOTB – Events

- Leveraged event booking page type (*lesson learned*)
- Extensive attendee management

Actions	Event	Start time	End time	Capacity	Attendees	Open from	Open to
	2.12.Automation Alley Technology Industry Outlook	2/12/2015 10:30:00 AM (UTC - 05:00)	2/12/2015 1:00:00 PM (UTC - 05:00)	350	135	12/1/2014 5:00:00 PM (UTC - 05:00)	2/11/2015 1:00:00 PM (UTC - 05:00)
	Global Economic and Industry Outlook for 2015 and Beyond	1/22/2015 8:00:00 AM (UTC - 05:00)	1/22/2015 11:30:00 AM (UTC - 05:00)	100	61	12/8/2014 2:16:16 PM (UTC - 05:00)	1/21/2015 3:00:00 PM (UTC - 05:00)
	3.25.Cybersecurity for Business: Assessing Threats and Managing Risks	3/26/2015 8:00:00 AM (UTC - 05:00)	3/26/2015 11:30:00 AM (UTC - 05:00)	100	42	2/4/2015 11:27:37 AM (UTC - 05:00)	3/24/2015 11:59:00 PM (UTC - 05:00)
	2.11.Automation Alley Orientation	2/11/2015 8:00:00 AM (UTC - 05:00)	2/11/2015 10:00:00 AM (UTC - 05:00)	100	35	1/6/2015 9:41:20 AM (UTC - 05:00)	2/10/2015 1:00:00 PM (UTC - 05:00)
	Grow Your Business Through Exporting: Tips to Get Started	1/15/2015 11:00:00 AM (UTC - 05:00)	1/15/2015 1:00:00 PM (UTC - 05:00)	50	23	11/20/2014 8:49:04 AM (UTC - 05:00)	1/13/2015 11:59:00 PM (UTC - 05:00)
	3.24.ReConnecting IT Talent to Business	3/24/2015 3:00:00 PM (UTC - 05:00)	3/24/2015 5:00:00 PM (UTC - 05:00)	100	21	2/20/2015 9:28:41 AM (UTC - 05:00)	3/23/2015 12:00:00 PM (UTC - 05:00)
	2.20.Doing Business in Chile and Colombia	2/20/2015 8:00:00 AM (UTC - 05:00)	2/20/2015 11:30:00 AM (UTC - 05:00)	100	15	1/27/2015 2:03:13 PM (UTC - 05:00)	2/19/2015 1:00:00 PM (UTC - 05:00)
	3.19.Business Growth Committee Meeting	3/19/2015 8:30:00 AM (UTC - 05:00)	3/19/2015 10:00:00 AM (UTC - 05:00)		9		3/17/2015 12:00:00 AM (UTC - 05:00)
	4.15.Cutting Through the Red Tape	4/15/2015 7:15:00 AM (UTC - 05:00)	4/15/2015 9:00:00 AM (UTC - 05:00)		9	3/6/2015 4:41:02 PM (UTC - 05:00)	4/13/2015 11:59:00 PM (UTC - 05:00)
	Automation Alley Orientation	12/10/2014 8:00:00 AM (UTC - 05:00)	12/10/2014 10:00:00 AM (UTC - 05:00)	100	8	11/19/2014 10:57:29 AM (UTC - 05:00)	12/8/2014 11:59:00 PM (UTC - 05:00)
	2.23.CATIA V5 Foundations Class	2/23/2015 8:30:00 AM (UTC - 05:00)	2/27/2015 5:00:00 PM (UTC - 05:00)		7	1/26/2015 11:51:34 AM (UTC - 05:00)	2/23/2015 8:30:00 AM (UTC - 05:00)
	2.19.Technology Committee Meeting	2/19/2015 8:30:00 AM (UTC - 05:00)	2/19/2015 10:30:00 AM (UTC - 05:00)		5	2/9/2015 4:20:44 PM (UTC - 05:00)	2/17/2015 11:59:00 PM (UTC - 05:00)
	1.29.Manufacturing Committee Meeting	1/29/2015 9:00:00 AM (UTC - 05:00)	1/29/2015 11:00:00 AM (UTC - 05:00)		4		
	2.18.Education and Workforce Committee Meeting	2/18/2015 8:30:00 AM (UTC - 05:00)	2/18/2015 10:00:00 AM (UTC - 05:00)		3		
	3.20.Education and Workforce Committee Meeting	5/20/2015 9:00:00 AM (UTC - 05:00)	5/20/2015 10:30:00 AM (UTC - 05:00)		3		
	Technology Committee Meeting	12/18/2014 8:30:00 AM (UTC - 05:00)	12/18/2014 10:30:00 AM (UTC - 05:00)		3		

Extend API – Paid Events

- Utilized Kentico sample code to tie Event Booking to e-commerce system
 - <http://devnet.kentico.com/articles/events-as-products-in-kentico-8>
- Extended Product API to auto modify price based off user's member level

The screenshot displays a web-based product management interface. The 'General' tab is active, showing fields for 'Product name:*' (12.2 Michigan's Got Talent Series: Companies Sh*), 'SKU number:', 'Price:*' (40), and 'USD'. Below these are partially visible fields for 'List price', 'Department', 'Manufacturer', 'Supplier', and 'Image'. An 'Event Logistics' modal window is open, showing 'Member Price:' (20), 'Foundation Member Price:' (0), and 'Walk-in Price:' with a text area containing 'Members - At the door: \$30' and 'Non-members - At the door: \$50'.

Extend API- Paid Events

- Modified Event Booking screen to show additional paid detail

The screenshot shows the 'Automation Alley' interface for an event titled 'Automation Alley Technology Industry Outlook (booking event)'. It features a search form for attendees with fields for First name, Last name, E-mail, and Phone, each with a 'Contains' dropdown menu. Below the form is a table of attendees with the following columns: Actions, First name, Last name, Email, Phone, Order ID, Paid, Automation Alley Member ID, Automation Alley Member Name, and Registered By.

Actions	First name	Last name	Email	Phone	Order ID	Paid	Automation Alley Member ID	Automation Alley Member Name	Registered By
	Al	Carpinelli		224	Yes	509			Al Carpinelli
	Will	Brick		272	Yes	819			Will Brick
	Daryl	Crawford		140	Yes	124			Daryl Thomson
	Daryl	Thomson		140	Yes	124			Daryl Thomson
	Ahron	Katz		202	Yes	13			Moshe Newman
	Stuart	Newman		202	Yes	13			Moshe Newman
	Alex	Burkulas		32	Yes	228			Alex Burkulas
	Eric	Strouse		51	Yes	598			Gary Abernathy
	Gary	Abernathy		51	Yes	598			Gary Abernathy
	Heather	Keller		51	Yes	598			Gary Abernathy
	Alice	Swanger		104	Yes	34			Alice Swanger
	Amy	Courter		164	Yes	950			Madison Petrosky
	Blair	Evans		87	Yes	423			Blair Evans
	Rochelle	Black		243	Yes	618			Rochelle Black
	Blaine	Tiltander		117	Yes	945			Blaine Tiltander

ECOMMERCE

Extend API – Customized Cart

- Extended cart for multiple attendees
- Custom class to override pricing through process
- Update attendee information through final order process

This is a preview mode of page [Add Attendees](#). [Close](#) the preview mode.

Automation Alley
Technology's Marketplace for Business

About Membership Programs & Services News Events The Fund Job Board Blog

ADD EVENT ATTENDEES

Please add additional event attendees below.

3.26 Cybersecurity for Business: Assessing Threats and Managing Risks

Fred Durst

BACK NEXT

FOUNDATION MEMBERS

Extend API – Custom Payment Gateway

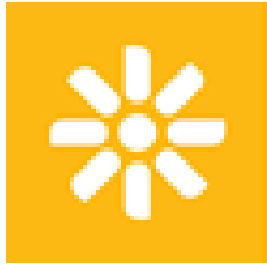
- Chose Braintree (a PayPal company) for ecommerce provider
 - Flexible and solid code base
- Create custom payment provider
- Kept membership payments outside of shopping cart process
- Webhook technology

Plan ID	Name	Price	Trial	Billing Cycle
test_plan_1	Test Recurring	\$350.00 USD	none	Every 1 Month(s)

Solid Lessons Learned

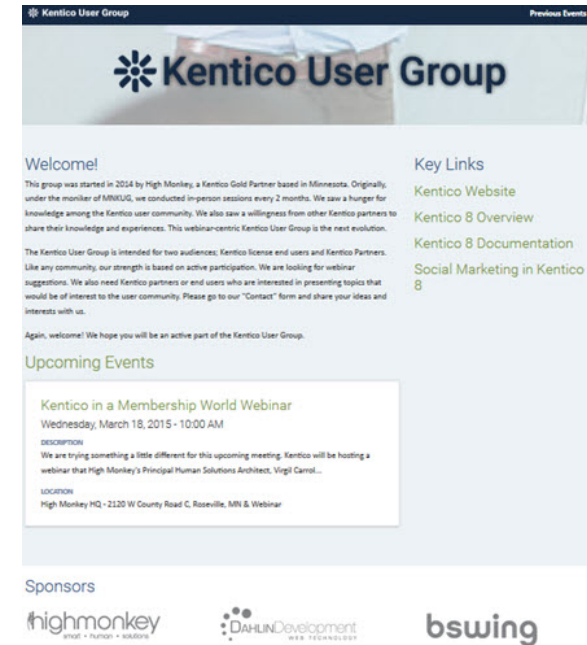
- Almost any CMS implementation takes something custom
 - Having an extensible system is key
- Just because you can custom dev, doesn't mean you should
 - Remember humans have to manage the system after your done
 - Gain a solid understanding of what OOTB really offers
- I've become a Macro believer
 - Both the ones I build and the OOTB

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Upcoming Kentico events

- Next user group meeting
 - Using the Hierarchical Viewer – Demonstration of two powerful uses of it
 - Presenter: Joel Dahlin, Dahlin Development
 - Date: May 13th, 10am
 - Going to monthly after – if interested to speak, reach out to bhaukos@highmonkey.com
- Kentico Connection
 - Melbourne - October
 - Orlando – early November
 - Brno – late November

Other Kentico stuff

- Good Kentico resources
 - DevNet
 - Question & Answers
 - Articles
 - Stackoverflow
- Working on a blog series around the integration of Kentico and SharePoint
 - Getting to build the ultimate search
 - Will start publishing in early April
 - Webinars may follow

questions??

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