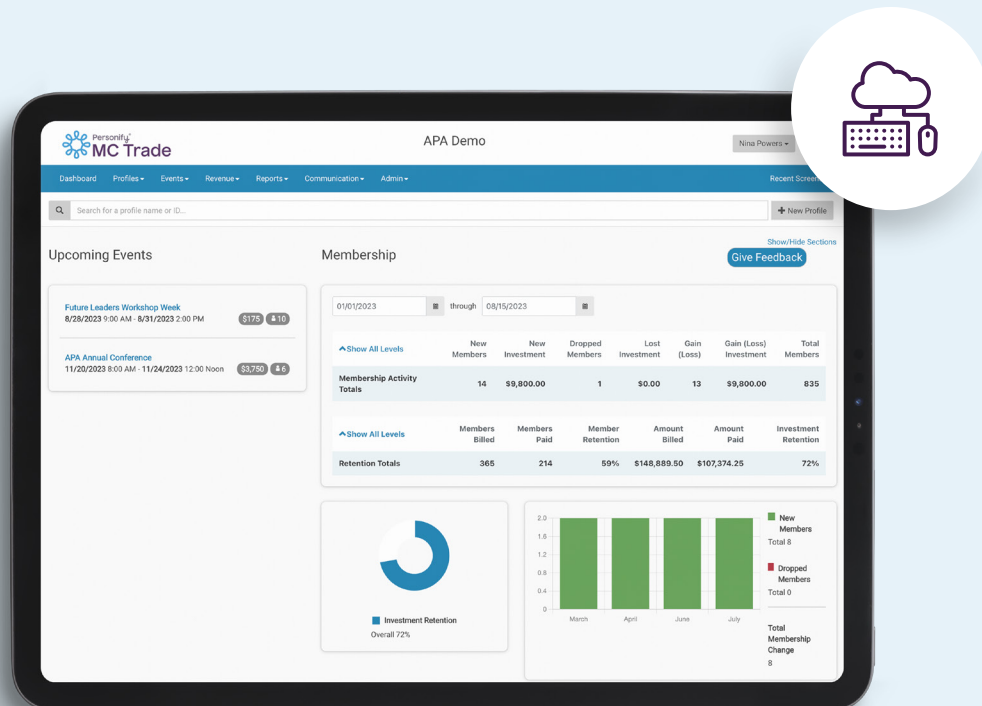




## Desktop v. Browser Feature Parity

2024 marks the completion of our move to the browser! Take a peek at all of the great features we brought over from the desktop, brand new capabilities only available in the browser and a few features that are no longer available.

Far from being a finish line, our development in the browser is just warming up. Stay tuned for exciting feature releases in 2024 + beyond!



# Features You Loved in the Desktop, Available in the Browser



## ✓ PROFILE MANAGEMENT

- Profile quick search
- Profile advanced search
- Bulk profile updates
- Profile/member creation & editing
  - » Affiliation codes
  - » Member activities
  - » Contact records
  - » Profile relationship management
  - » Custom fields
  - » Certifications and CEUs
- Bulk drop
- Sales opportunity management
- Committee management
- Profile-specific & general user task management
- Profile import
- Advanced listing overrides
- Listing YouTube widget
- Search contact records
- WMS import link/NAHB export
- Voter voice integration

## ✓ COMMUNICATION MANAGEMENT

- Send email messages
- HTML templates
- Build profile & invoice email contact lists
- Review sent messages
- Automatically create contact records
- Web content management
- Banner ad management
- News article management
- Entity domain management
- Web content referral tracking

## ✓ REPORTING

- Run/export standard reports
- Run/export custom reports
- Run/export data export/reporting tool queries
- Create/edit a data/export reporting tool query
- Run a custom SQL query
- Data dictionary

## ✓ REVENUE/FINANCIALS

- Invoice quick search
- Search for and select/export invoices
- Profile invoice history and management
  - » Aging summary
  - » Invoice printing/export to PDF
  - » Billing records management
- Create invoices, payments & adjustments
- Bulk apply payments
- Generate invoices based on billing records
- Auto-update billing amounts based on rates or formulas
- View and export credit card activity
- Manage eCommerce items and transactions
- Account importing
- Bulk invoice write-off
- ACH support
- One-time invoice for multiple profiles
- Post transactions
- Pledge campaign tracking
- Custom SQL ARC configuration
- Delete batches

## ✓ SYSTEM ADMINISTRATION

- Association info
- Users & user roles
- System types & codes
  - » Profile/membership codes
  - » Revenue codes
  - » Event codes
  - » Web component codes
- System settings
- Restore profile
- Merge profile
- QB class codes
- Coupon type setup
- News article type setup
- Member source codes
- Payment source codes
- Entity types



# Exciting New Features, Only Available in the Browser

## + PROFILE MANAGEMENT

- Certification/CEU profile search
- Form submission response profile search
- Create contact records in bulk
- Set profiles as prospects in bulk
- Visual profile summary page
- Committee management
  - » Profile-level committee management
  - » Add committee members in bulk
  - » Upload agenda/minutes to committees
  - » Automatically inactivate expired committee members based on terms
- Benefit search/management
- Profile change request processing (including editing requests)
- Select custom fields & affiliation code values to appear in profile selector results
- Import custom fields, category, member since & additional individual data for new or existing profiles
- Add/edit pronouns on a profile

## + REPORTING

- Upload multiple custom reports at a time
- Build queries for certifications, CEUs & benefit data
- Save queries with dynamic date ranges
- Dynamic system dashboard visualizations

## + REVENUE/FINANCIALS

- Revenue item-based invoice searching
- Codeless pricing calculations based on FTE or custom field values
- Email invoice download links
- Send receipt on payment entry
- Invoice line item balance detail
- Profile unapplied payment management
- Override/manage invoice generation exceptions
- Allow members to opt in to ARB through the member portal

## + COMMUNICATION MANAGEMENT

- Save email drafts
- Set up recurring emails for automation on a daily/weekly/monthly basis
- Send to multiple email types per profile
- Send printable invoice dynamic link
- Email analytics (open and click rates)
- MailChimp integration
- Form builder
  - » Configurable, automated join form setup
  - » Renewal, donation & general form setup
  - » Response management & export options

## + SYSTEM ADMINISTRATION

- Configuration settings (batch drop settings, profile selector settings, etc.)
- Membership level management



## EVENTS

Events capabilities are ONLY available in the browser. You'll have the power to promote and execute top-notch events with the tools to manage every step of the planning process, all while creating a seamless registration experience your members will love.



# Deprecated Desktop Features

Some features do not translate well to browser-based solutions, and/or no longer serve the needs of most of our clients.

## − PROFILE MANAGEMENT

- Send local email link on profile
- Details tab fields: credit rating, SSN, gender, salutations, do not send fax
- Prospect protection
- Project search/timelines

## − REVENUE/FINANCIALS

- Update billing revenue items/anchor months in bulk
- Revenue recognition summary
- Billing service period overrides
- Member portal invoice notifications

## − COMMUNICATION MANAGEMENT

- Plain text emails
- URL selector
- Survey management
- Business connect management
- Web input results

## − REPORTING

- Report explorer

## − SYSTEM ADMINISTRATION

- Download core data
- Encryption tool

## Guidance + Resources for Moving Forward

Access All FAQ For Desktop To Browser [HERE](#)

### Professional Services Packages

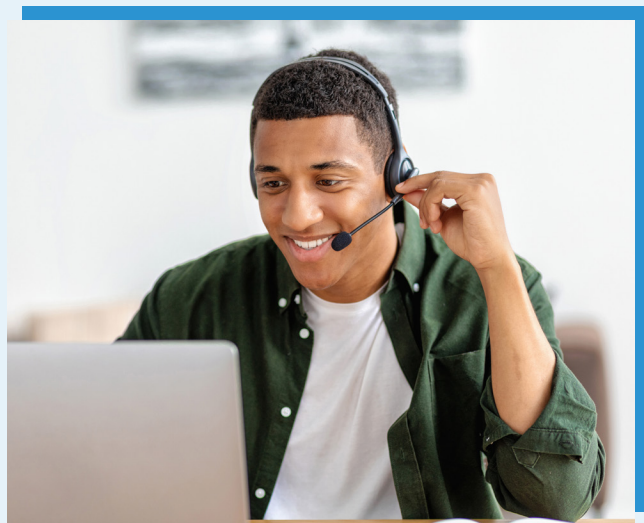
Get the support that's right for you — whether that's one-time troubleshooting or partnership on an ongoing basis, we've got a package that fits your needs.

[BROWSE PACKAGES](#)

### Personify Loop

The Loop is a community built JUST for Personify clients, providing a space for collaboration, sharing best practices and making connections with industry peers.

[JOIN THE LOOP](#)



### Product Webinars

Want to sharpen your product knowledge and stay up to date on all the newest MC Trade features? Keep an eye out for email invites to our upcoming webinar series.

