Aptify

The Association Success Company

Aptify's Full Family of Applications

Aptify is devoted to the association market. We offer 21 out-of-the-box applications suited for mid- to large-sized organizations. Our robust menu of membership management software is designed to enhance convenience, connectivity, communication, and collaboration for your organization and your membership.

Abstract Management
Through integration with Aptify e-Business, Abstract Management allows your members to go online and then submit, edit, and effectively manage their abstract submissions. Upon submission, you can then track and detail the necessary information regarding the abstract all through Aptify.

Accounting
Aptify Accounting (A/R) works with Aptify Product & Inventory Management to handle the core concepts of Orders, Invoices, Products, Packages, General Ledger(s), and multiple financial organizations. The Accounting module operates using both cash and accrual methods of accounting, and all data is exportable to any major third-party accounting software package.

Awards Management
One of the best ways that associations recognize the most engaged members is through awards and rewards programs. Reward programs are designed to incent members to engage in a way that is beneficial to the association and the member. They can be as simple as tracking referrals for new members to complex points-based systems similar to loyalty programs found at airlines and hotels. Aptify has solutions available to manage the complete array of awards and rewards programs.

Business Intelligence/Viewing
By enabling BI capabilities directly within Aptify, your staff can easily access these powerful analytical tools without needing to learn a complex third-party product. Aptify analysis tools are web-enabled so that information can be delivered seamlessly to any person in any format. Using the scheduling capabilities built into Aptify, key reports and metrics can be set automatically to run at a user-defined frequency and delivered to one or more recipients via email, the web, or a mobile device.

Case Management
With Aptify Case Management, you'll have the tools necessary to ensure that high quality service is in place for any type of inquiry that comes into your organization, including requests for support, service, complaints, and other inquiries. For organizations involved in mediating disputes, case management provides the functionality to manage the entire cycle of case receipt through resolution in an integrated, workflow-oriented environment.

▸ Unlimited case types, each of which may have unique workflow and routing
▸ Automatic notifications for new cases, status updates, case closure and more
▸ Flexible case assignment logic for determining case assignments
▸ Cost tracking for internal and external costs
▸ Ability to integrate with third-party service providers for case resolution
▸ Survey capabilities allow for detailed customer feedback tracking
▸ Centralized cross-case issue tracking

Campaign Management

Aptify includes a full featured marketing and e-Marketing application that empowers your organization to create and manage truly integrated, multichannel communication and campaign outreach programs to reach current and prospective customers. Aptify blends together the features and functionality required for managing complex campaigns that have multiple media types across both on-line and print publications, direct mail, email, newsletter, and live media venues.
▸ Create highly targeted marketing campaigns to maximize the potential of your offerings
▸ Target and identify prospects based on any combination of filtering criteria
▸ Easy to use graphical tool to define segmentation logic
▸ Develop personalized communications to any number of segments within a campaign

Chapter Management

Manage your chapters, councils, and other component organizations with ease. Aptify provides comprehensive capabilities for managing chapters and components. The functionality handles both the internal requirements for tracking chapters and components as well as web self-service needs of chapter officers and members.
▸ Track an unlimited number of chapters, components, councils, and other affiliates

▸ Associate individual and company members with any number of component organizations and track history of each membership distinctly
▸ Track component level events, publications, journals, content, and other offerings
▸ Enable content personalization on the web for members based on their memberships
▸ Officers can add/update/remove members
▸ Members can interact with their chapter communities through on-line tools
▸ Events for each chapter can be managed on-line and displayed to members

Committee Management

Committee Management includes functionality for tracking members, nominees, meetings, assignments, and more. The committee functionality is available for both internal users as well as external committee members through the web. Committee members tend to be among the most engaged association members out there.
▸ Unlimited number of committees, sub-committees, terms, members, and nominees
▸ Easy-to-use member management tools for adding and removing members
▸ On-line experience for committee members to securely view information and collaborate through documents and forums
▸ Extensive built-in reporting
▸ Nomination tracking and processing
▸ Tracking of roles within a committee

Customer Relationship Management (CRM)

The Customer Relationship Management enterprise functionality set is an advanced system of tracking member and non-member demographic information in the database.

Philosophically, Aptify treats constituents in the database as they are in real life: individuals/organizations first, and members second—meaning that the client can track members and

non-members in the software in unique ways with the same degree of power and flexibility, and then easily add/manage membership attributes when applicable. The Aptify CRM tool allows a staff member to cleanly view system-wide information related to a constituent, in a single and easy-to-navigate location, while also allowing for configurable displays and data-entry formats. For companies and individuals, staff members can easily track an unlimited quantity of addresses, phone numbers, email addresses, preferred communication methods, job functions, contact logs, follow-up tasks, relationships, etc., for each record.

As each organization handles its membership structure in different ways, Aptify offers fully integrated and robust membership management functionality.
▸ Create an unlimited number of membership types and dues structures, including lifetime memberships
▸ Set membership expiration dates for each type
▸ Establish pricing matrices that can be used to calculate membership dues
▸ Bundle membership with other companion products

e-Business
The Aptify e-Business Suite is flexible, easy to use, and provides both a technology platform and set of business features specifically built for the web. Aptify's e-Business Suite contains a complete set of business features that includes:
▸ e-Commerce: product catalog, shopping cart, and product reviews
▸ User profile management
▸ Personalized content delivery
▸ Discussion forums
▸ Committee management
▸ Online polls and surveys
▸ Chapter management
▸ Directories
▸ Virtual tradeshow/marketplace

▸ Integrated security
▸ Slim, meta-data−driven web components that can be plugged into any HTML page

Meetings & Events
Aptify provides meeting and event management professionals functionality to meet the demands of any size seminar, event, or trade show. The full lifecycle of an event is handled through the software, including planning, logistics, marketing, budgeting, and registration.

The application functionality is fully integrated into the rest of the AMS so event professionals can harness the full benefits of the Aptify system. Additionally, our e-Business suite provides an easy-to-use experience that is tuned to making your members' lives easier.

Aptify Meetings and Events functionality includes robust project, customer, and campaign management functionality to provide you with a 360-degree view of your entire event management process, with integrated order and registration processing and real-time reporting of all meeting logistics and processes.

Product & Inventory Management
The Aptify Product & Inventory Management application facilitates a centralized, integrated, and uniform approach to managing products and related inventories across the entire platform. From a single location, users are able to create products of any type (i.e., Membership, Subscription, Event Registration, etc.) and set product attributes, including specialized pricing tables, eligibility requirements, volume discounts, dates available, renewal options, inventory warehouses, and GL Accounts, while remaining PCI-compliant. Aptify users also are able to utilize several pre-configured wizards to manage related-product prompts for up-selling and cross-selling, as well as product kits that contain multiple product offerings for a single rate.

Inventory Management is an advanced tool to help organizations keep track of all products' availabilities and locations. For physical goods such as books, users will be able to manage multiple warehouses, inventory locations, product inventory ledgers, backorders, set replenish levels, manually adjust inventory levels, and calculate inventory values based on FIFO, LIFO, or average methodologies. Inventory Management also assists with non-physical goods like event registrations, where an organization needs to track products with limited availability and backorders.

Sales Force Automation

The Aptify Sales Force Automation (SA) application is designed to empower an organization's sales team to close more deals by increasing efficiency in opportunity tracking. This application enables management teams to have more visibility into the sales process, thereby increasing predictability in revenue forecasting. Using Aptify SFA, customers can define and report against sales targets set by management, track an opportunity's progress through the customer-defined stages of a pipeline, and deliver improved reporting on sales prospects, referrals, pipelines, and demand levels. Using the Business Intelligence & Analytics tool built-in, management can create views that show sales activities in real time, across the board.

Subscriptions & Publications

Aptify's comprehensive feature set includes unlimited subscriptions at each level, flexible subscription types, job functions and infinite linking of subsidiaries. The richness of the demographic data will allow you to work intelligently with prospects and active subscribers.

▸ Manage an unlimited number of publications and subscriptions
▸ Variable subscription types and terms
▸ Bulk subscriptions
▸ Auto-renewal via credit card and other electronic payment methods

▸ Sell direct through agencies and on-line
▸ Manage the detail required for ABC/BPA circulation audit reporting
▸ Complete integration with Order Entry and A/R provides for seamless customer service
▸ On-line subscription processing and renewal with Aptify e-Business
▸ Standing order support for new editions and frequency-based fulfillment of repeat orders

Surveys

The Aptify Surveys application enables organizations to get critical feedback from their constituents in real-time through the web or through alternative methods such as email, fax, or hardcopy. Survey administrators have a complete range of enterprise capabilities, including generating survey forms with an unlimited number of questions, configuring survey question display formats, categorizing surveys by type, setting survey availability dates, enabling partial completion of survey responses, allowing for multiple survey responses from the same constituent, and more. Utilizing Aptify's unique Answer Logic functionality, survey administrators can even configure surveys to present questions, in order and content, based on a respondent's answers to previous questions.

The following applications are available as add-on modules.

Advertising Management

The Aptify Advertising Management application enables complete tracking of advertising, including publications, versions, and frequency of ads run. Organizations will be able to keep a detailed history of specific criteria, including ad size, color, caption, or text to identify an ad, and allow for special position and placement requests for complete account history. Staff can link rate cards to specified publications to automatically populate rate information when placing an advertising order. Using this module,

managers can track sales quote amounts, rate card amounts, agency discounts, and price overrides with multiple rate cards available. The Aptify Advertising Management application also includes access to the Aptify Commission and Royalties application.

Commission & Royalties

The Aptify Commission and Royalties application is designed to support commission structures throughout an organization, offering a flexible method to provide monetary incentive and recognition for sales performance. Commissions can be calculated based on specific products and services sold or on product categories. Staff will have the ability to plan specific promotional programs for designated products to encourage key or slow sellers with additional selling commission incentives.

With a date-sensitive commission plan structure, organizations can have simultaneous plans for monthly and quarterly sales, while providing additional incentives for a contest running for a short period of time, as well. Commission structures can be simple or complex, with tiered structuring to provide incentives at different levels of sales performance. Group sales performance can also be rewarded, as a commission agreement can recognize a person, employee, or company as the commission payee. The Commission Payment Wizard streamlines and automates the process of commission payments, whether it's direct to payroll or to other companies for contract employees.

Education & Certification Management

Aptify Education Management is a complete system for managing education delivery, certification, and licensing. Some of its uses include professional licensing programs, certification programs, and continuing education courses. Aptify allows an organization to manage course planning and administration, which includes setting up courses, classes, instructors, and exams for certification and continuing education.

Aptify can handle basic continuing education unit tracking and can also be used for managing complex certification and accreditation programs which have multiple courses and categories. The software allows an organization to manage planning, registration, financial transactions, and tracking a student's certification status.

The Aptify e-Learning Management System (LMS) provides a web-based, SCORM-compliant, student and instructor portal for on-line learning and collaboration between students and instructors.

Education: Learning Management System

Aptify has an available Learning Management System (LMS) add-on for the Education application which automatically enables courses to be delivered over the web through the Aptify e-Business Suite. The LMS environment is a SCORM-compliant content delivery system. Any SCORM-compliant content can be directly imported and deployed to an end-user through the web.

▸ Choose the authoring tool of your choice and publish your content in a SCORM package
▸ Import the SCORM object and make it available over the web securely
▸ Members can browse courses on-line, register, pay, and immediately begin taking classes
▸ Incorporate feedback such as exams, surveys, polls, and directly move results into the database
▸ Integrate third-party LMS and LCMS products, if desired

Fundraising & Grant Management

Aptify Fundraising and Grant Management includes an array of powerful features to help both fundraising and grant management professionals excel.

▸ Prospect and donor tracking features allow fundraising managers to access extensive biographical and demographic information

- Tailor tracking details to the needs of each organization or fundraising professional
- Easily query, view, print, and export extracted donor information, in any format
- Record and view information about all types of gifts and pledges made to various funds
- Track the success of each fundraising campaign or event
- Automatically handle matching contributions from organizations and individuals
- Solicitor Management keeps a detailed record of a solicitor's activities so you can determine their contribution to the campaign's success
- Integrate with Aptify's powerful Contact Management module to track the activity involved with soliciting your major prospects
- Built-in business intelligence and analytics functionality allows users to identify trends, evaluate campaign and solicitor results, and drill down into details in any area of the system
- Easily build models to help forecast potential future results based on understood trends

Mobile Solutions

Aptify Mobile Solutions grants access to Mobile Point of Sale applications and the Aptify Mobile App (free of charge in the Apple App Store) to equip your association with the power of relevancy and connection.

Aptify Mobile Point of Sale is designed to allow association staff members to process onsite orders from any venue at any time covering a full range of products. Based on a purpose-driven design, navigation within Mobile POS is easy and efficient, providing an excellent experience for both cashier and customer. A direct connection to the Aptify system provides Mobile POS with a full range of support, including:

- On-device reporting, including Sales Report, Inventory Report, and Cash Reconciliation Report
- Purchases, returns, product/price lookups, and previous purchase lookup
- Standard payment methods, including credit cards, cash, and credit memo
- Tax-exempt sales based on customer's company profile
- Event configuration, including campaigns (discounts), product set, attendee list
- Customer lookup to enable pre-population of order information and organization-specific pricing rules
- Inventory tracking

The Aptify Mobile App (free of charge in the Apple App Store) provides broad functionality to an organization's staff to ensure employees can access CRM data from anywhere. Staff can look up Person and Company records, access key information on recent orders and contact logs, view contact information, and map constituents' addresses in Google Maps. The application supports a wide range of smart phones and tablets and also offers a touch-optimized user interface.