

# NOVI SUMMIT

**MARCH 6-8, 2023**  
**TAMPA, FL**



Presented by **NOVI** AMS





# NOVI NEWBIES



SUMMIT

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# Agenda



- The Novi Story
- Novi 101
- A Walk Through Novi
- Deep Dives:
  - Membership
  - Events
- *Break!*
- Deep Dives (Cont.)
  - Reports
  - Ecommerce
- Q&A Panel



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# Jump In!





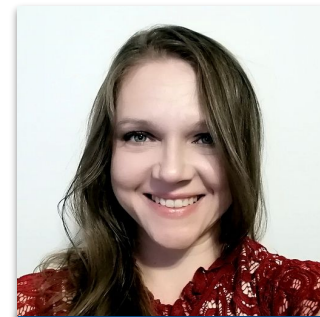
# Meet The Customer Experience Team



**Lane Gibbs**  
Director of  
CX



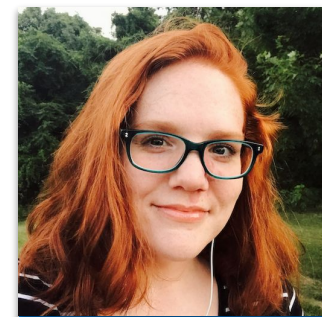
**Melisa Smith**  
Director of  
Product Quality



**Melanie Dupont**  
Senior  
CX Specialist



**Jaime Morgan**  
Senior  
CX Specialist



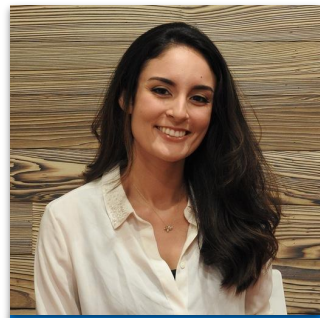
**Erin Marks**  
CX  
Specialist



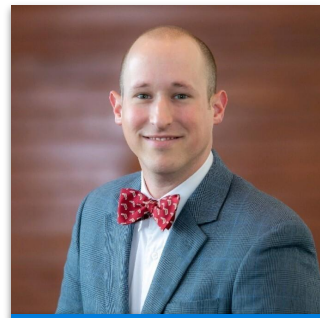
**Taryn Hill**  
CX Specialist



**Lea Martinez**  
CX Specialist



**Jessica Fullerton**  
CX Specialist



**Jon Shiver**  
CX Specialist



# Novi AMS

**Built For Associations By Associations**



Not a slogan, or a marketing ploy. It's quite literally the truth - it's our story.



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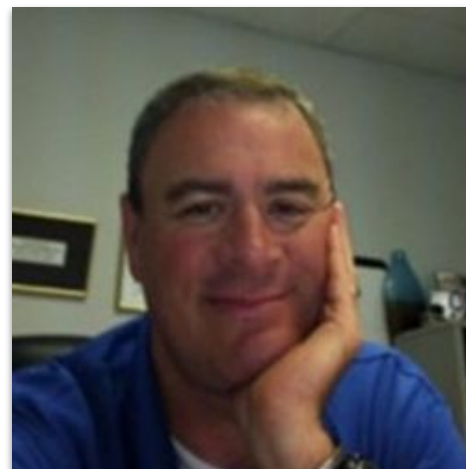
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# Core Four-ish



Russ Webb



Adam Skolnik, CAE



Kelle Senyé



Mike Pennington, CAE



Chip Tatum, CAE





# The Story Continues With You..



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Projects /  Novi Dev / AMS-12998 /  AMS-12218

**As an admin, (GNAA, NAIBA, PBS, NYSVMS, ACCT, SBCA) I want to be able to enter an End Date (or Unpublish Date) for blog posts so I can automatically hide posts like Job Openings**

 Attach

 Create subtask

 Link issue





# Novi 101



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# Intercom

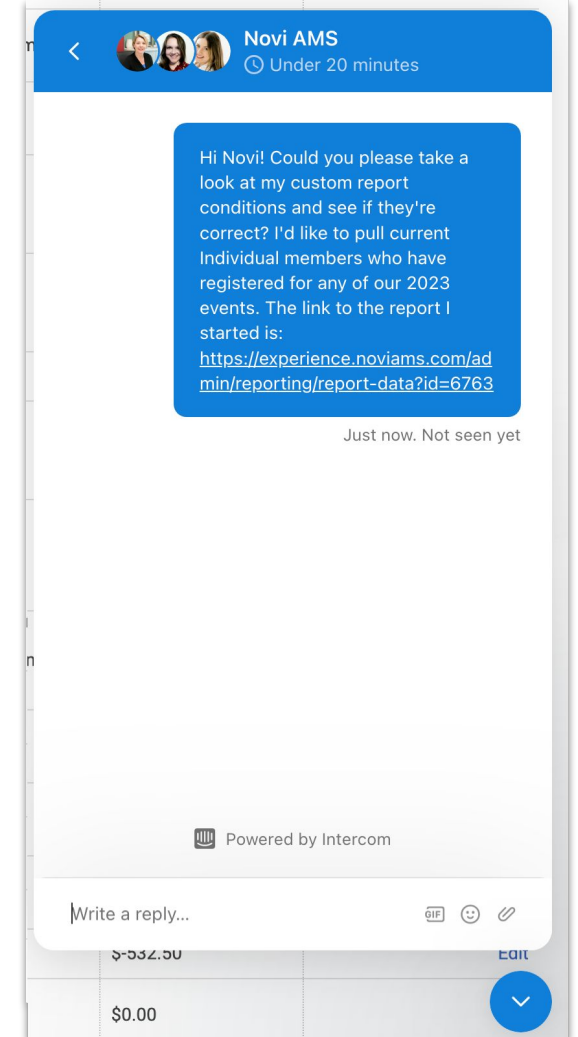
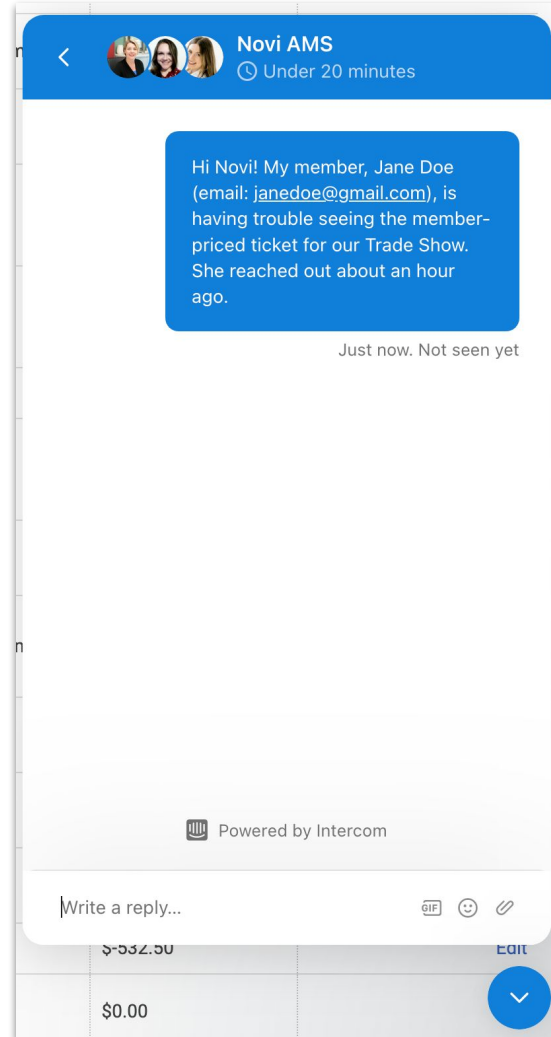
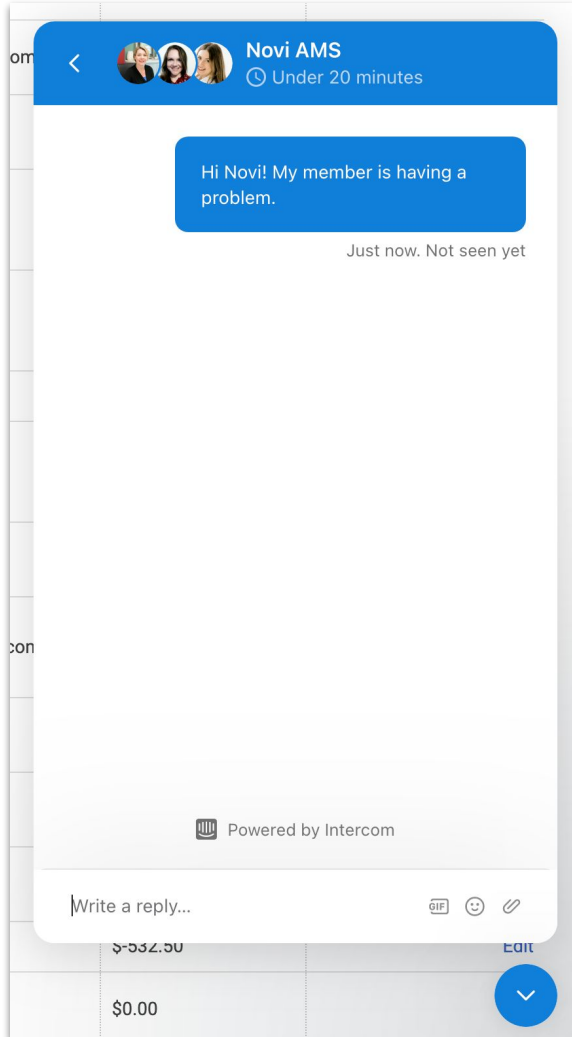
Say hi to “The Blue Bubble”!

- Your portal to the Novi team
- Not just for questions
- Help center access
- Ask away! (15 minute rule)
- Or... [help@noviams.com](mailto:help@noviams.com)
- We communicate here too!
- Office hours
- Reply time



A screenshot of the Novi AMS Intercom chat bubble. The bubble has a blue header with the Novi AMS logo and three profile pictures. Below the header, it says "Hi melisa@noviams.com" with a hand icon and "How can we help?". There are three main sections: "Send us a message" with a right arrow and "We typically reply in under 30 minutes"; "Search for help" with a search icon and a list of help topics including "Creating &amp; Updating Leadership Roles", "Member Compass: Novi's Online Member Portal", "Updating Your Website's Homepage", and "Impersonate Users on the Frontend, Pull"; and a bottom navigation bar with "Home", "Messages", and "Help" icons. At the bottom of the bubble, it says "Powered by Intercom" and "Edit" with a blue circular button containing a downward arrow. The bubble is overlaid on a table with columns for "\$0.00" and "Edit".

# Intercom



# Feature Requests

## Bringing Your Ideas to Life

- Novi's secret sauce
- The Backlog
- Submit via Intercom
- The "why" behind the ask
- Agile development
- Biggest impact features and tweaks



↑ Melisa Smith changed the status to Done on [AMS-9563](#): As an admin, (FRWA,AASPA,WIM, AMA, Prospects, Meg, GPCA,NCBA, CalSAE,AAAL, MANP, SPR/NGage, MAFSI) I want CSV downloads to only export the columns I'm viewing in Novi so I don't have to delete/filter out columns that I don't need



amsworks.atlassian.net

2d



Hi Lydia!

Just an update that a request from this conversation, to be able to download a .csv from list view in Novi with only the visible columns instead of all columns, has passed through our QA process and should be out in an upcoming release!

Seen • 2d



I saw that is so exciting. Thanks so much!



7h

# Educate



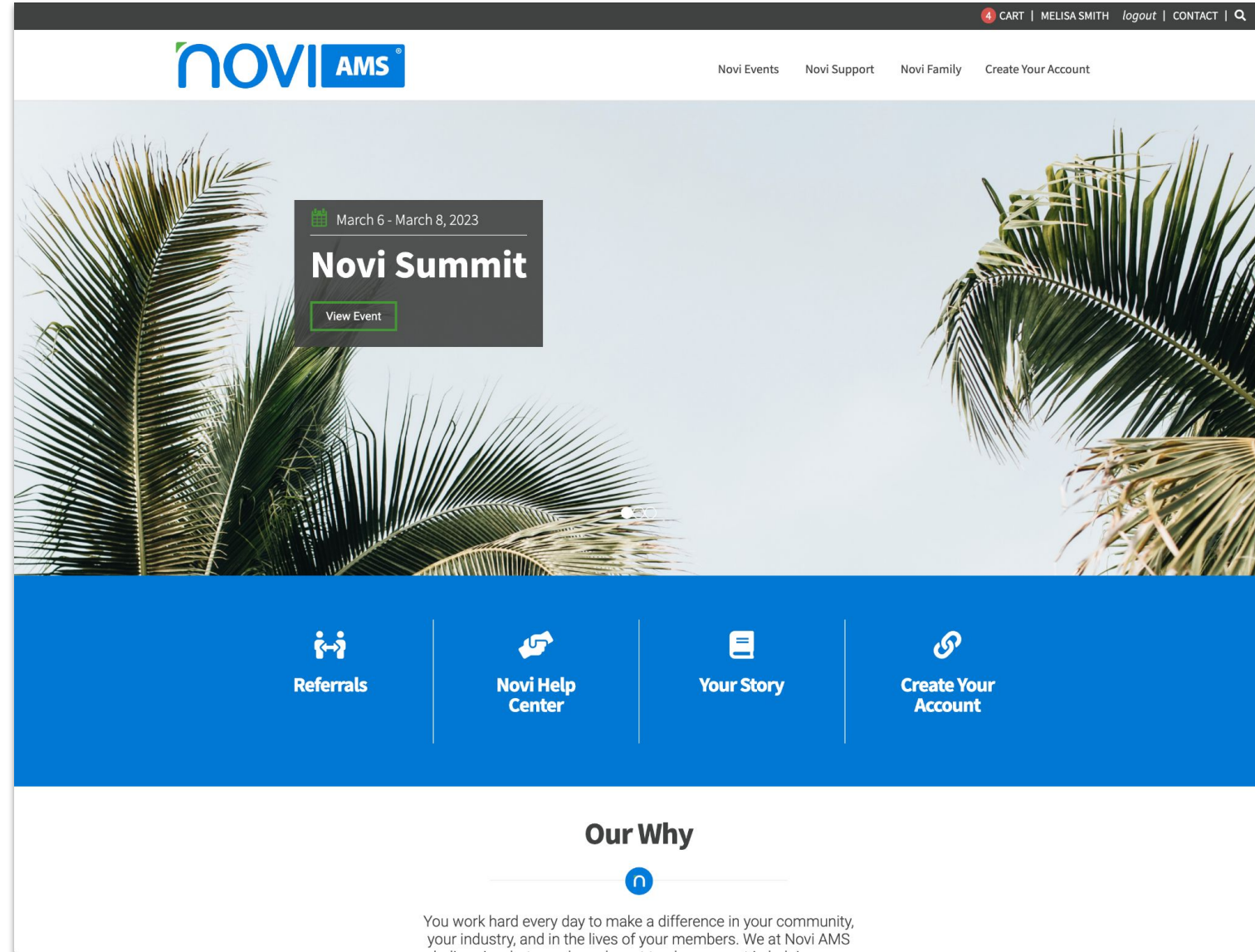
**novi AMS** [Go to Novi AMS](#)

Advice and answers from the Novi AMS Team

Search for articles...

- Accounting & QuickBooks Online**  
Leverage the combined power of Novi AMS and QuickBooks Online.  
105 articles in this collection  
Written by Pete Zimek, CAE, Jenn Norman, CAE, Melisa Smith and 2 others
- Member Management**  
Manage member data in a way that "Just Works."  
103 articles in this collection  
Written by Pete Zimek, CAE, Jenn Norman, CAE, Melisa Smith and 3 others
- Member Signup & Member Compass**  
Keep your members connected, informed & engaged.  
24 articles in this collection  
Written by Pete Zimek, CAE, Jenn Norman, CAE, Melisa Smith and 3 others
- Emailing Members**  
Delivering your messages to your members' inboxes.  
23 articles in this collection  
Written by Pete Zimek, CAE, Jenn Norman, CAE, Melisa Smith and 2 others

# Novi HQ



The screenshot shows the Novi AMS website homepage. At the top right, there is a navigation bar with links for 'CART', 'MELISA SMITH', 'logout', and 'CONTACT'. The main header features the 'novi AMS' logo and a secondary navigation menu with 'Novi Events', 'Novi Support', 'Novi Family', and 'Create Your Account'. The central banner is a large image of palm trees with a dark overlay box containing the text 'Novi Summit' and 'March 6 - March 8, 2023', along with a 'View Event' button. Below the banner is a blue navigation bar with four icons and labels: 'Referrals', 'Novi Help Center', 'Your Story', and 'Create Your Account'. The bottom section is titled 'Our Why' and includes a paragraph of text.

4 CART | MELISA SMITH | *logout* | CONTACT | Q

novi AMS

Novi Events | Novi Support | Novi Family | Create Your Account

March 6 - March 8, 2023

**Novi Summit**

View Event

Referrals | Novi Help Center | Your Story | Create Your Account

**Our Why**

You work hard every day to make a difference in your community, your industry, and in the lives of your members. We at Novi AMS believe in what you do and want to do our part in helping you





# Novi Exchange



**novi AMS exchange**

My Community Directory Participate Events search

## Welcome to Novi Exchange

Collaborate with peers to share strategic advice, solve challenges, and develop new approaches.

**Search**  
Search the online community to find answers to your questions!  
Begin Search

**Post**  
Ask questions and join in on discussions with your peers!  
Get Started

**Connect**  
Find and connect with other Novi customers, your peers!  
Connect Now

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# Novi Notes



A screenshot of a software interface showing a help menu. At the top, there are icons for settings (gear), help (question mark), and a user profile (M). The help menu is titled "Need help?" and is divided into two sections: "FIND AN ANSWER" and "ASK A QUESTION". Under "FIND AN ANSWER", there are two items: "Help Articles" with the subtitle "Find your answers fast" and "Novi Notes" with the subtitle "AONW Reference Guide". Under "ASK A QUESTION", there is one item: "Novi Exchange".

A screenshot of the Novi Notes page content. The page header shows "Association of No Workarounds" with a plus sign and a refresh icon. The main content area has a heading "Novi Notes" followed by a welcome message: "Welcome to Novi Notes! These notes are meant to serve as an internal reference on how to use the Novi AMS platform. Consider adding details about processes, procedures, and any other special nuances that you would like to have a quick reference to. Customer-specific notes should remain on individual customer records." Below this is an "Edit" button and a "Last" link. The next section is "Monthly Report" with a link: "Pull this each month and send to board: <https://experience.noviams.com/admin/reporting/report-data?id=5848>". The following section is "New Member Approval Process" with a paragraph: "The steps below should be completed for new members in the [Recent Signups](#) list on a daily basis (or weekly at the most since they will not receive membership benefits until approved)." This is followed by a bulleted list of three steps. The final section is "Annual Membership Renewal Process".

Association of No Workarounds

## Novi Notes

Welcome to Novi Notes! These notes are meant to serve as an internal reference on how to use the Novi AMS platform. Consider adding details about processes, procedures, and any other special nuances that you would like to have a quick reference to. Customer-specific notes should remain on individual customer records.

[Edit](#) Last

### Monthly Report

Pull this each month and send to board: <https://experience.noviams.com/admin/reporting/report-data?id=5848>

### New Member Approval Process

The steps below should be completed for new members in the [Recent Signups](#) list on a daily basis (or weekly at the most since they will not receive membership benefits until approved).

- For new member signups (with a status of Pending), confirm they have a Sales Receipt or an Invoice with a status of Paid. Do not approve membership until dues have been paid!
- Check for duplicate records. If they've created a second record for themselves or a company, follow the steps in this article to merge the records: [Merge Records in Novi AMS](#)
- When all steps above are complete, click the **Approve** or **Clear** link in the Action column.

Related Help Article: [Who Appears in Recent Signups & How to Clear the List](#)

### Annual Membership Renewal Process

# Roundtables



**novi** AMS Go to Novi AMS

Search for articles...

All Collections > Novi Roundtables

## Novi Roundtables

View recordings of past Roundtables.

61 articles in this collection  
Written by Pete Zimek, CAE, Jenn Norman, CAE, Melisa Smith and 7 others

**Roundtable Recap: Year in Review & 2023 Priorities**  
January 25, 2023  
Written by Jessica Fullerton  
Updated over a week ago

**Roundtable Recap: Data Cleanup for New Year's**  
December 20, 2022  
Written by Jessica Fullerton  
Updated over a week ago

**Roundtable Recap: Upgrade Your Data Security**  
November 10, 2022  
Written by Jessica Fullerton  
Updated over a week ago

# Release Notes

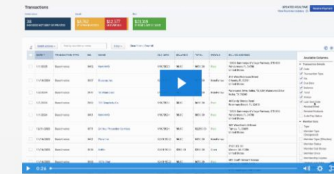


< Jessica >

Active 2h ago  
San Antonio, US

Hi [melisa@noviams.com](mailto:melisa@noviams.com),

Want detailed data about your attendees or transactions *without* jumping to custom reports? With even more **customizable columns**, you can build detailed spreadsheets directly from any list view!



Report-building is more accessible than ever. Find out how in the [latest edition of release notes](#).

[Learn More](#)

Write a reply... GIF 😊 ✎

532.50 EDIT

\$0.00

novi AMS Go to Novi AMS

Search for articles...

All Collections > New Features & Updates

## New Features & Updates

Just like your association, Novi is constantly growing.

+2 99 articles in this collection  
Written by Pete Zimek, CAE, Jenn Norman, CAE, Melisa Smith and 2 others

### Our deployment schedule, and why it's strict

Updates to our application are deployed every two weeks, and rarely more often, to mitigate risk.

Written by Pete Zimek, CAE  
Updated over a week ago

### Making an Impact: Prioritizing Your Novi AMS Feature Requests

A message from our founder on how we incorporate the ideas and feedback of association professionals into every line of code we write.

Written by Pete Zimek, CAE  
Updated over a week ago

### New Features Added to Novi AMS & Other Recent Updates

#### Customize your columns on backend list views, hide shipping details on pickup-only products, and more!

Early February 2023 Release Notes

Written by Jessica Fullerton  
Updated over a week ago






# Training



**NOVI AMS** Novi Events Novi Support Novi Family Create Your Account

## Novi Group Training Sessions

Search  Novi Group Training Sessions List View Calendar


<b>Mar 14</b>	<b>Website Content Training</b>  2:00 PM - 3:00 PM EDT <span>Details</span>
<b>Mar 15</b>	<b>Events Training</b>  3:00 PM - 4:00 PM EDT <span>Details</span>
<b>Mar 16</b>	<b>Reports Training</b>  2:00 PM - 3:00 PM EDT <span>Details</span>
<b>Mar 22</b>	<b>Transactions Training</b>  2:00 PM - 3:00 PM EDT <span>Details</span>
<b>Mar 28</b>	<b>Website Content Training</b>  2:00 PM - 3:00 PM EDT <span>Details</span>

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# Workshops



Novi Events   Novi Support   Novi Family   Create Your Account

## Trainings and Workshops

🔍 Trainings and Workshops

	<b>One-on-One Training - 1 Hour</b> <i>Have a new staff member or just want to brush up on some of your Novi skills? Book one-on-one...</i>	Member Price: \$95	<a href="#">View</a>
	<b>One-on-One Workshop - 1 Hour</b> <i>Want an extra set of eyes on your dues rules or event tickets? Perhaps you'd like some help...</i>	Member Price: \$95	<a href="#">View</a>
	<b>One-on-One Workshop - 1/2 Hour</b> <i>Want an extra set of eyes on your dues rules or event tickets? Perhaps you'd like some help...</i>	Member Price: \$65	<a href="#">View</a>



# Consider Your Ecosystem





# How much of a Novi Newbie are you?



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# A Walk Through NOVI!



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# Let's Really Dive In!



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# Membership



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# Membership

Add your email to the [Daily Digest Recipients list](#) so you get notified of new signups and membership-related activities!



## Daily Digest

### Invoices Not Sent or Printed

Please be advised that you have invoices that have not been sent or printed. This could be intentional, but we suggest that you review your [transaction list](#).

Learn more about the types of information included in this email in our [Daily Digest Overview](#) article.

Remember, the Novi AMS team is always here to help.  
Thanks!



101 South Garland Avenue Suite 108  
Orlando, FL 32801  
(888) 504-6685





# Membership

## Renewal processes

When a renewal occurs:  
*invoice created*  
*expiration date moved forward*

Sending out Renewal invoices  
*batch send in*  
*Accounting > Transactions*

**Transactions** UPDATED REALTIME [View Realtime Updates](#) [Receive Payment](#)

Needs Action Unpaid Paid

27  
INVOICES NOT SENT OR PRINTED

\$27,755  
84 OPEN INVOICES

\$13,794  
61 OVERDUE

\$10,191  
49 PAID LAST 30 DAYS

Batch actions 1  Filter ▾ Clear Filter / View All 📄 ⚙️

	TRANSACTION TYPE	NO.	NAME	DUE DATE	BALANCE	TOTAL	STATUS	ACTION
	Non-renew & credit	1850	Century Hills	12/31/2023	\$964.00	\$964.00	Open	View ▾
	Receive Payment	1839	Palmas Apartments	2/17/2023	\$451.50	\$451.50	Overdue	View ▾
<input checked="" type="checkbox"/>	Dues Invoice	1670	Bette Davis	3/1/2023	\$550.00	\$550.00	Overdue	View ▾
<input checked="" type="checkbox"/>	Dues Invoice	1753	Danish Cookies Company	12/12/2022	\$1,000.00	\$1,000.00	Overdue	View ▾

< First Previous 1-4 Next Last >

# Membership

## Top tips for membership



Just because a member's invoice is Overdue doesn't mean they are necessarily restricted from accessing benefits. What can you do?

- [Restrict invoicing privileges](#) for customers with overdue balances
- Restrict benefits via [Novi Groups](#)
- Drop the member





# Events



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## Events

Connect attendees to member records if they accidentally register as a guest!



<input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/>	Geri	← <b>Not linked</b>
<input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/>	Fred Astaire	← <b>Linked</b>

1. Find the unlinked registration.
  2. Click **Edit** in the action column.
  3. Re-type the attendee's name!
- 





# Events

## Top Tips for Cleaning Up Attendee Lists and Ticket Details

Use ticket categories and limit visibility to polish your registration page.

Tickets	Price
<input checked="" type="checkbox"/> Early Bird Full Conference - Non-Member	\$600.00
<input checked="" type="checkbox"/> Early Bird Thursday Only - Non-Member	\$300.00
<input type="checkbox"/> Full Conference - Non-Member	\$700.00
<input type="checkbox"/> Thursday Only - Non-Member	\$350.00
<input checked="" type="checkbox"/> Welcome Reception <small>RSVP to the Wednesday night welcome reception!</small>	Free

vs.

Tickets	Price
- Early Bird Registration	
<input checked="" type="checkbox"/> Early Bird Full Conference - Non-Member	\$600.00
<input checked="" type="checkbox"/> Early Bird Thursday Only - Non-Member	\$300.00
- Registration	
<input type="checkbox"/> Full Conference - Non-Member	\$700.00
<input type="checkbox"/> Thursday Only - Non-Member	\$350.00



## Events

Charge a cancellation fee to cancel registrations *without* issuing a credit memo or refund.

### With credit memo or refund:

Subtotal:	\$600.00
Cancellation Fee:	<input type="text" value="0"/>
<hr/>	
Purchaser:	Monica Geller
Issue Credit Memo to <b>Central Perk</b> for:	<b>\$600.00</b>

### Without credit memo or refund:

Subtotal:	\$600.00
Cancellation Fee:	<input type="text" value="600"/>
<hr/>	
Purchaser:	Monica Geller
<p><b>The registration will be canceled, but no credit memo will be issued.</b></p>	



# Break Time!



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# Reports



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# Reports

New!

Display Columns  
Available in List Views

A screenshot of a software interface showing a 'Available Columns' menu. The menu is open, displaying a list of categories with expandable arrows. At the top of the menu are icons for printing, a document, and a gear. Below the menu is a 'Rows' section with a dropdown menu set to '50'.

Available Columns

- > Member Data
- > Contact Information
- > Personal Info
- > Related Records
- > Member Custom Fields
- > Activities & Engagement
- > Accounting
- > User Account
- > System

Rows

50 ▾



# Reports

Showing a Person's  
Company Name in  
Custom Reports

\* **Columns to Display** Click & drag to reorder;

Parent Info > Name 



# Reports

Member Type:  
Designated vs Effective

Member Type Info > Member Type (Designated) > Name ✕

Member Type Info > Member Type (Effective) > Name ✕





# Ecommerce



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# Ecommerce

Think Outside the Box:  
There can be more than  
just physical products in  
your store!

## Advertising, Event Sponsorship, and More

Search



### Buy/Sell Practice Ad - No Image

List your online classified ad for a period of 30 days. No image included. To post your ad, make...

Non-Member Price: \$100

Member Price: \$50

[View](#)



### Buy/Sell Practice Ad - Image

List your online classified ad for a period of 30 days. Image included.\* Including an image of...

Non-Member Price: \$115

Member Price: \$65

[View](#)



### 1/4 Page Ad in MVMA Newsletter

1/4 Page (Vertical) 3.5" wide x 5.0" high \*Specs: 300 dpi, JPG file, full color \*Ads...

Price: \$250

[View](#)



### 1/2 Page Ad in MVMA Newsletter

1/2 Page (Horizontal) 7.5" wide x 5.0" high \*Specs: 300 dpi, JPG file, full color...

Price: \$400

[View](#)



### Full Page Ad in MVMA Newsletter

Full Page 7.5" wide x 10.0" high \*Specs: 300 dpi, JPG file, full color \*Ads print in...

Price: \$600

[View](#)



### E-Newsletter Logo with Link

E-Newsletter Only Our E-Newsletter is emailed to over a thousand members! Showcase your companies...

Price: \$150

[View](#)



### MassVet Newsletter Classified Ad - Free

The MassVet News is the newsletter published by the Massachusetts Veterinary Medical Association....

Member Price: \$0

[View](#)



### MassVet Newsletter Classified Ad

The MassVet News is the newsletter published by the Massachusetts Veterinary Medical Association....

Non-Member Price: \$50

Member Price: \$30

[View](#)





## Ecommerce

Think Outside the Box:

Use Static pages or other Novi website sections to showcase your Products!

## Welcome to the NMLTA Store

This page is sponsored by:  **OLD REPUBLIC**  
NATIONAL TITLE INSURANCE COMPANY

We offer the following items to be purchased in our online store:

**On-Demand Classes for CE Hours (Members Only).**

**SELECT**

**NMLTA "Stars" Website Sponsorships**

**SELECT**

**Donations to NMLTA PAC or Chili Currier Scholarship**

**SELECT**

# Ecommerce



Virtual Products can be sent instantly, check your Details tab under Products!

**Confirmation & Virtual Delivery Information** *This information is shown on the Success page, after a purchase is made. It is also included in the confirmation email and within the Member Compass.*

← → **B** *I* U ~~S~~     *I*<sub>x</sub> <>

Thank you for your purchase of Webinar #23 Recorded on 2/17/2022. We appreciate your support!

Please click [here](#) to stream your webinar now!

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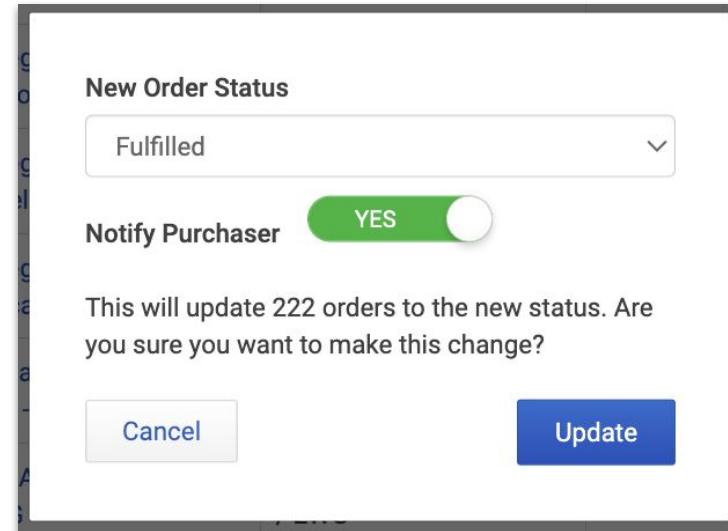
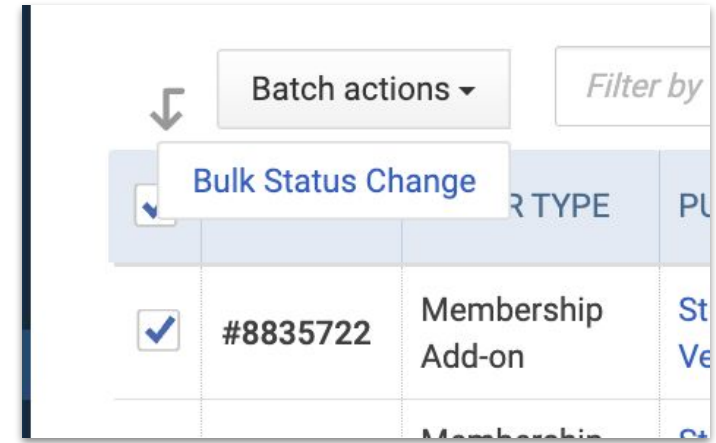
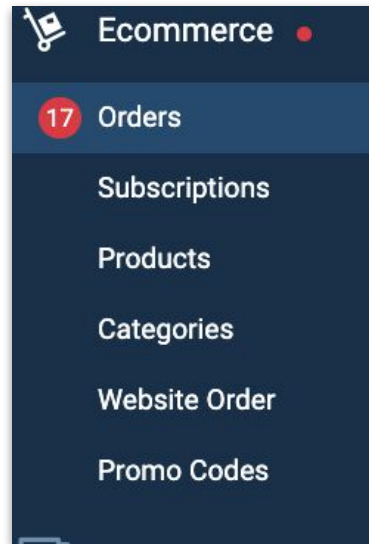
Presented by  



# Ecommerce

Orders - only shows orders that need fulfillment

Clear in bulk





# Pop Quiz!



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## Q1: True or False

- If your members auto-renew, Novi will automatically drop past due members for you.

Answer:

False!

If you are auto-renewing members, you are the grace period.

Drop them in bulk using the Non-Renew & Credit tool when you're ready.



Q2: Where are the  
2 places you'll  
receive our  
bi-weekly release  
notes?

Answer:

1. Intercom Chat Conversation Bubble
2. Your email!



Q3: Where should I go first to find a list of all of my current members?

Answer:

The main members list!





Q4: What is the URL to Novi's customer website?

Answer:

HQ.Noviams.com



Bonus Question!  
Can anyone tell  
us the difference  
between an  
invoice and a  
sales receipt?

Answer:

Invoice = An IOU that will be paid later by a  
*payment*

Sales Receipt = Paid with credit card  
immediately





What topic are you most interested to learn about at Novi Summit?



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We're listening, what's on your mind?



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# Novi Newbies Resources



Scan the QR for access to all the bacon shared today!



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# 5PM \ \ Opening Reception



- Head up to the Embassy Suites Pool Deck (3rd Floor)
- 5:00 – 7:00 PM Hors D'oeuvres & Drinks



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# THANK YOU TO OUR 2023 SPONSOR PARTNERS



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