Show Me Your Tech Stack

Sengii

Sponsor Introduction

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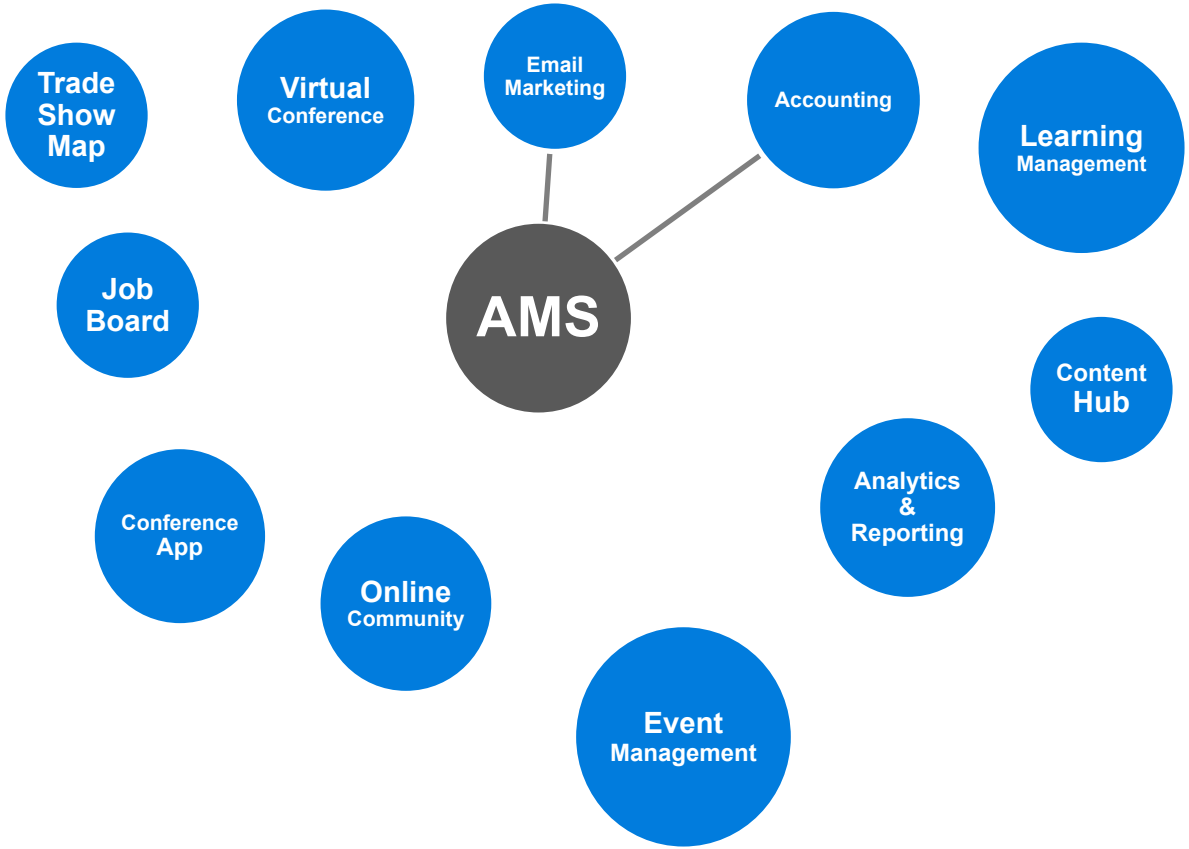
IAIABC

A Sengii & Novi Customer!

CLOC

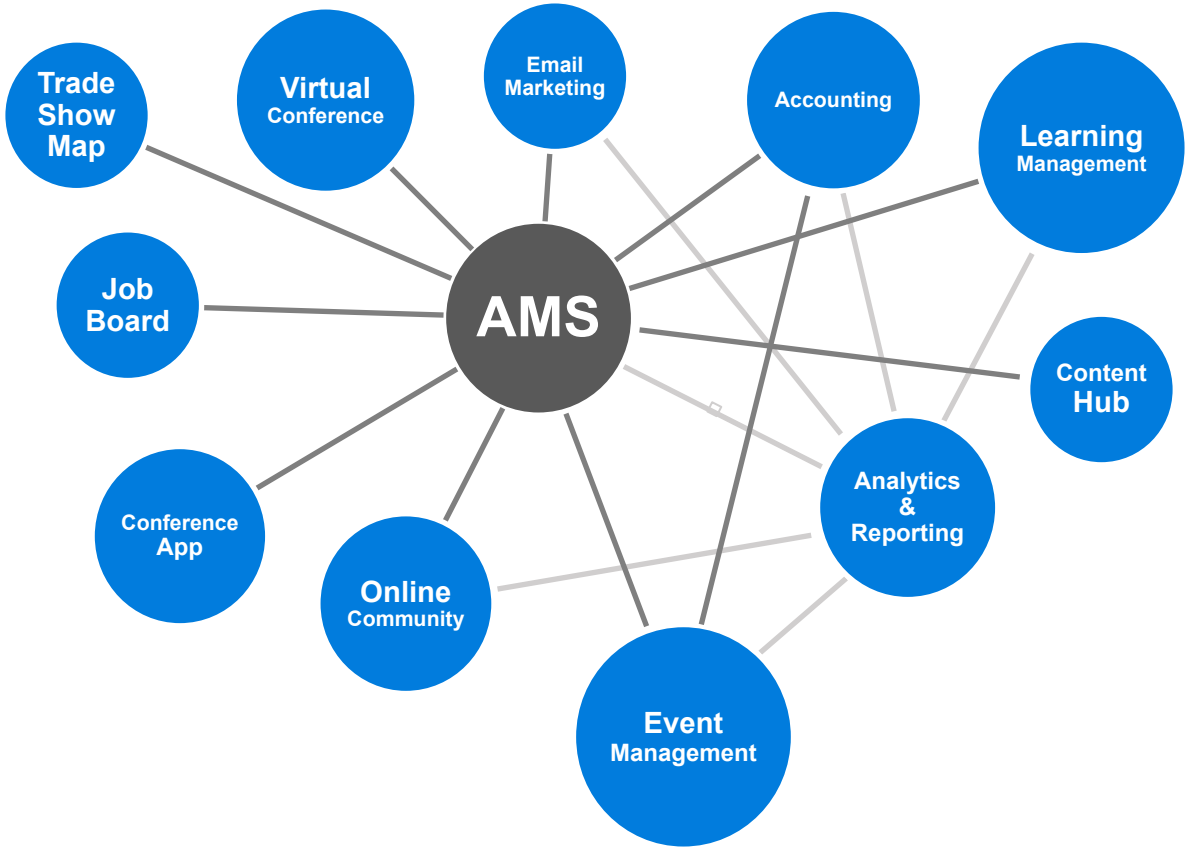
Wild West architecture

- Each system operates on its own.
- Data exchange via export-import
- Duplicative, unreliable, or dirty, out-of-date data
- Systems unable to talk to each other



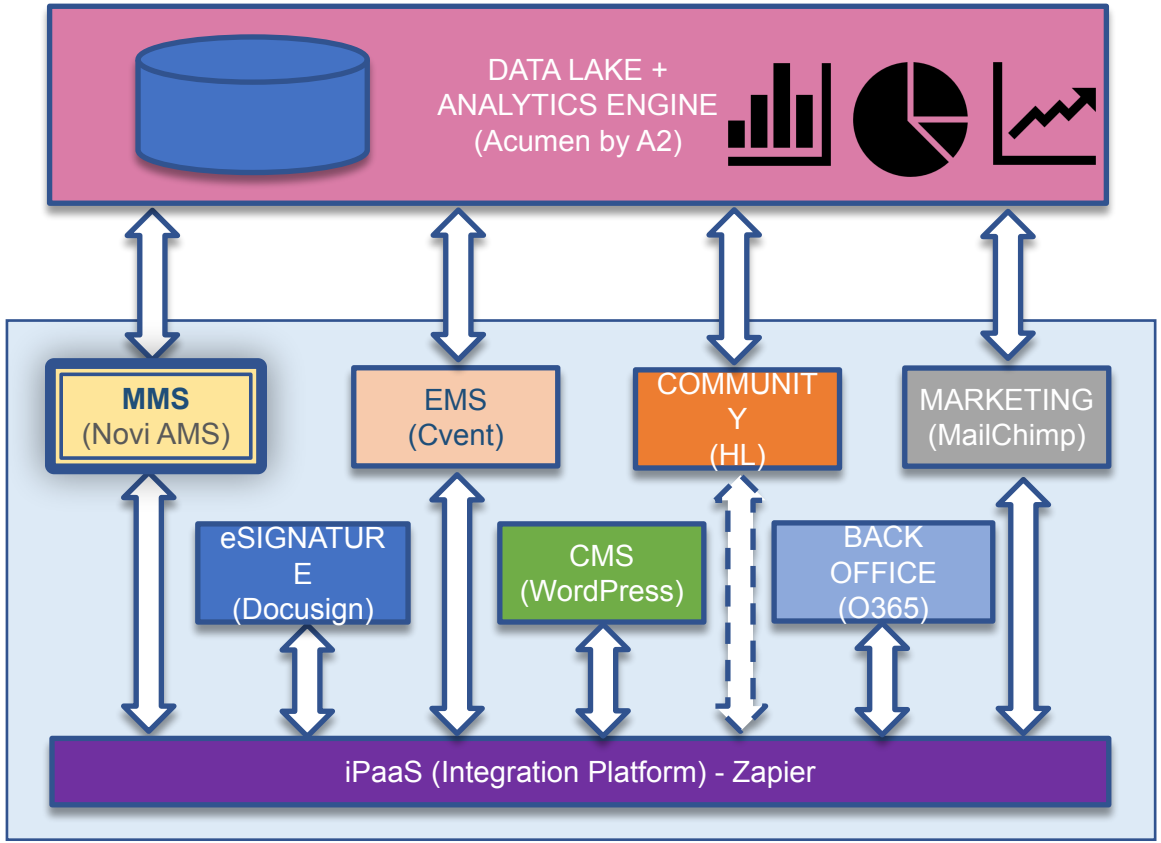
Network or Distributed architecture

- Systems can talk to each other.



Integrated Best-of-Fit Architecture

- Focus on purpose-built products.
- Prioritize products with existing integrations with the Data Analytics core
- Satellite systems can be easily unplugged and replaced

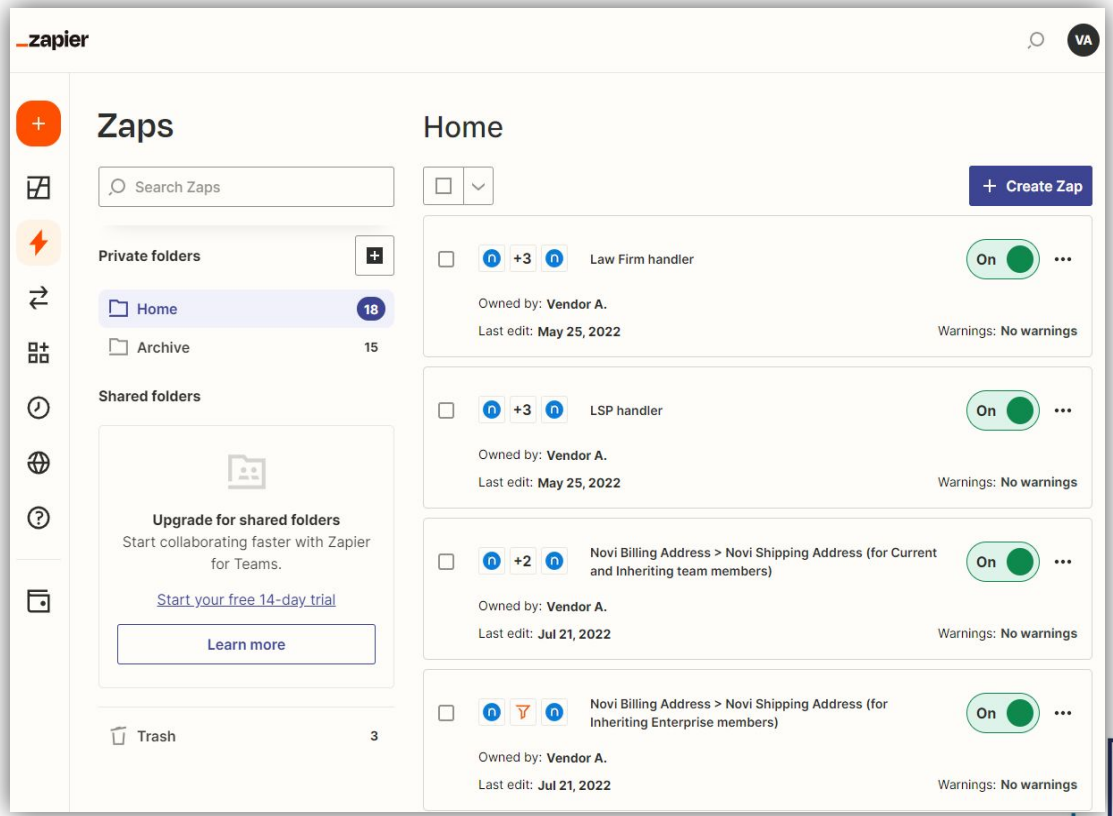


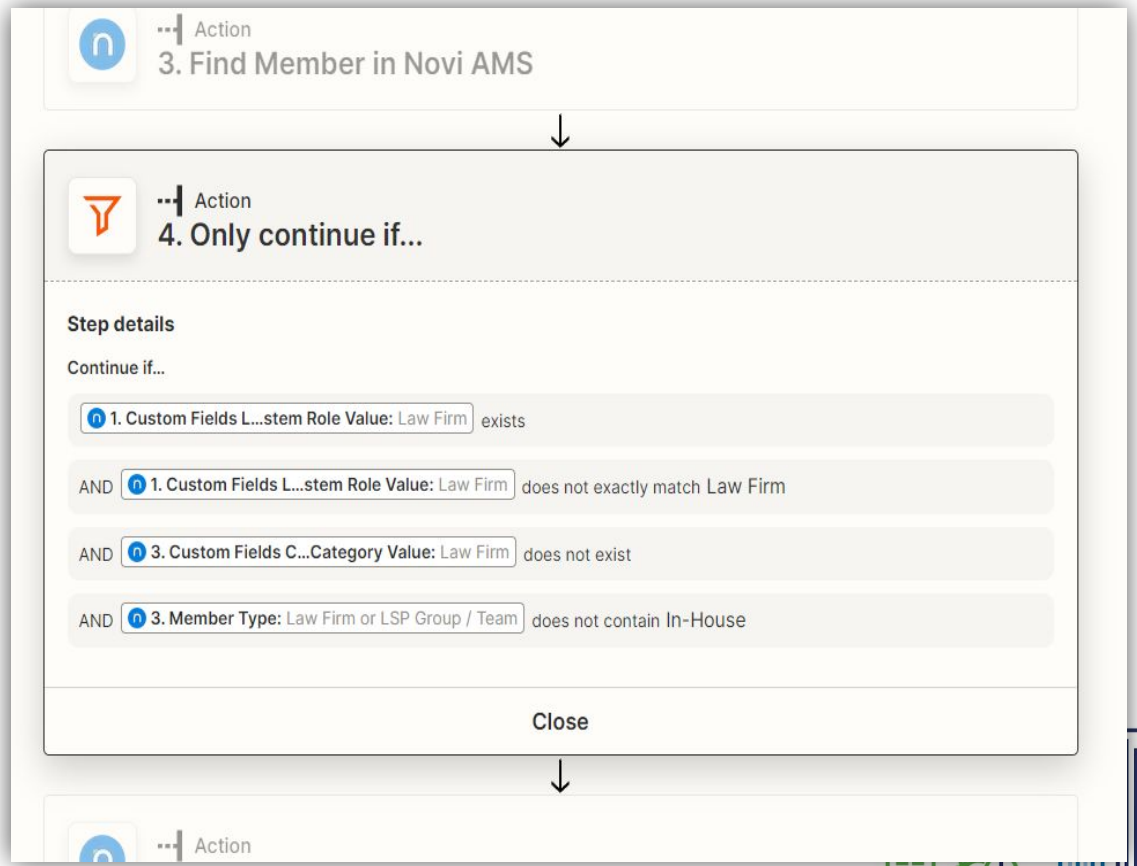
User Story 1: Legal Service Handler

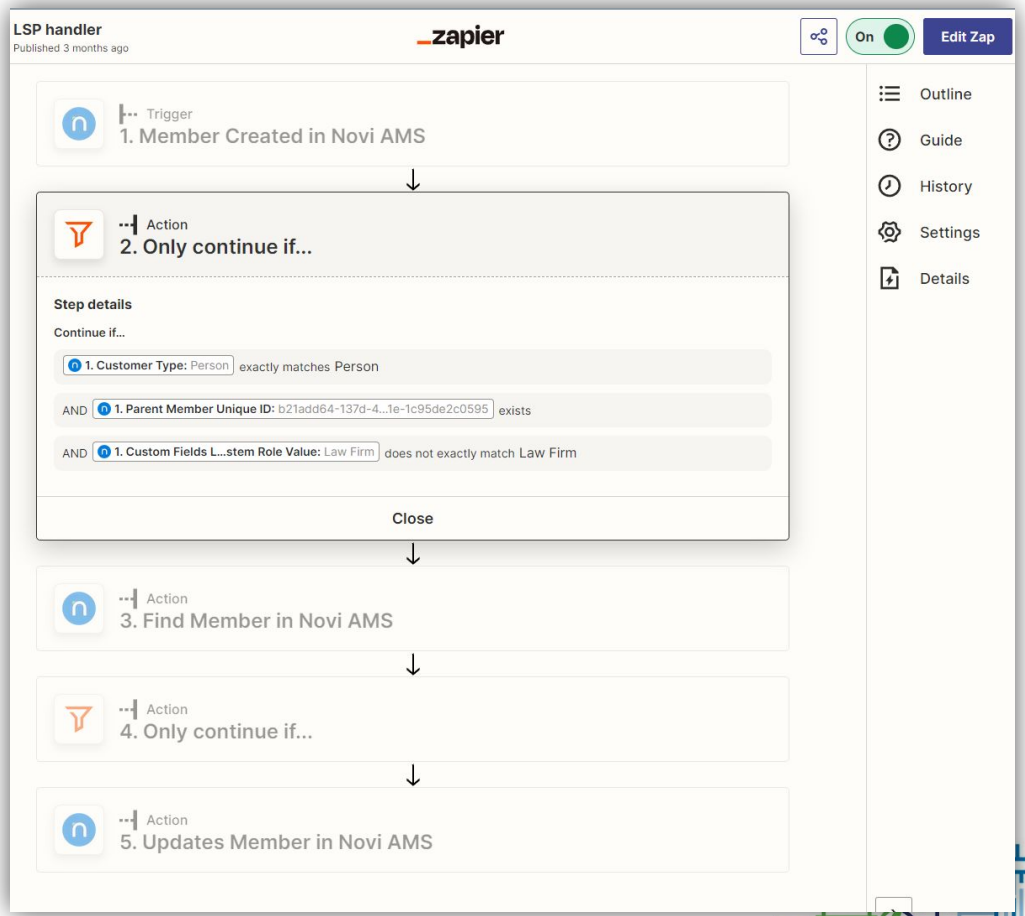
Novi-to-Novi automation

- **As a Membership Manager**, I want to properly categorize each non-member company when an individual-level member of specific type joins CLOC.

- **SOLUTION**: Create a Zap that will only run when an individual member of specific type is created. I will then find and update basic parent company record with relevant information from the individual member record.


zapier
VA
Zaps
Search Zaps
Private folders
Home 18
Archive 15
Shared folders
Upgrade for shared folders
Start collaborating faster with Zapier for Teams.
Start your free 14-day trial
Learn more
Trash 3
Home
Create Zap
+3 Law Firm handler
On
Owned by: Vendor A.
Last edit: May 25, 2022
Warnings: No warnings
+3 LSP handler
On
Owned by: Vendor A.
Last edit: May 25, 2022
Warnings: No warnings
+2 Novi Billing Address > Novi Shipping Address (for Current and Inheriting team members)
On
Owned by: Vendor A.
Last edit: Jul 21, 2022
Warnings: No warnings
Novi Billing Address > Novi Shipping Address (for Inheriting Enterprise members)
On
Owned by: Vendor A.
Last edit: Jul 21, 2022
Warnings: No warnings


Action
3. Find Member in Novi AMS
Action
4. Only continue if...
Step details
Continue if...
1. Custom Fields L...stem Role Value: Law Firm exists
AND 1. Custom Fields L...stem Role Value: Law Firm does not exactly match Law Firm
AND 3. Custom Fields C...Category Value: Law Firm does not exist
AND 3. Member Type: Law Firm or LSP Group / Team does not contain In-House
Close
Action

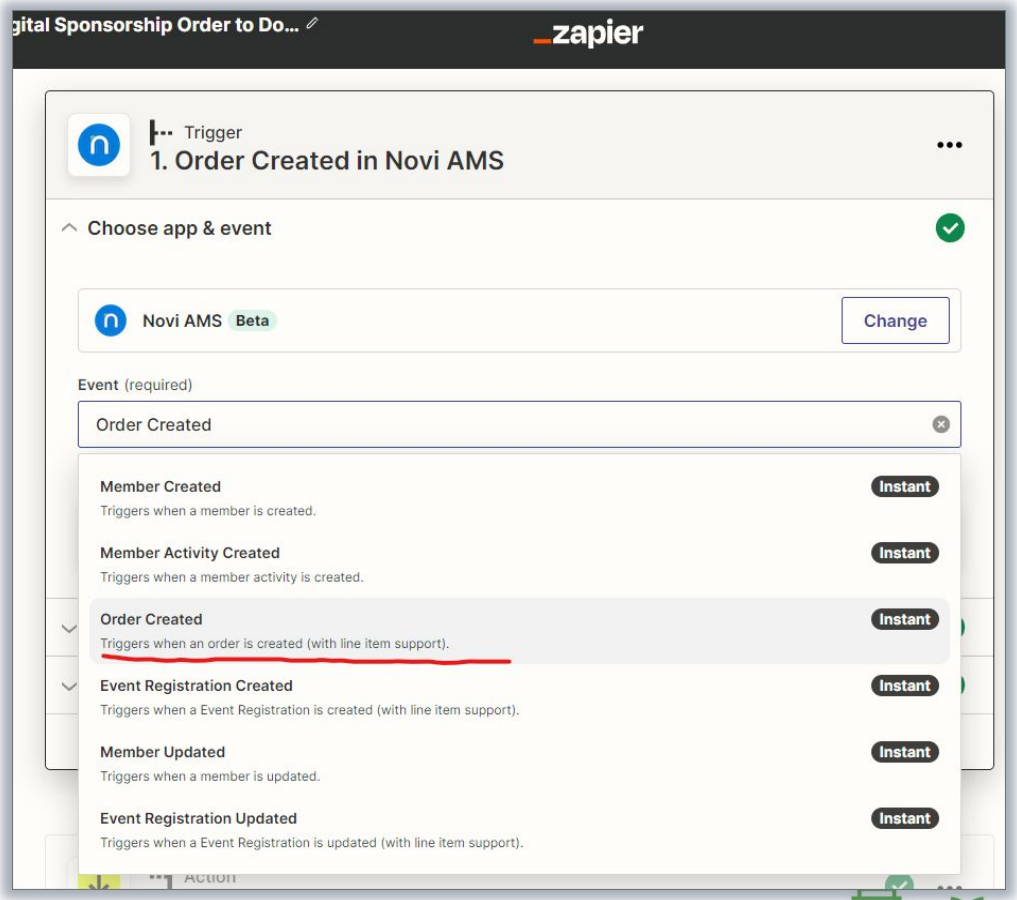

LSP handler
Published 3 months ago
zapier
On
Edit Zap
Trigger
1. Member Created in Novi AMS
Action
2. Only continue if...
Step details
Continue if...
1. Customer Type: Person exactly matches Person
AND 1. Parent Member Unique ID: b21add64-137d-4...1e-1c95de2c0595 exists
AND 1. Custom Fields L...stem Role Value: Law Firm does not exactly match Law Firm
Close
Action
3. Find Member in Novi AMS
Action
4. Only continue if...
Action
5. Updates Member in Novi AMS
Outline
Guide
History
Settings
Details

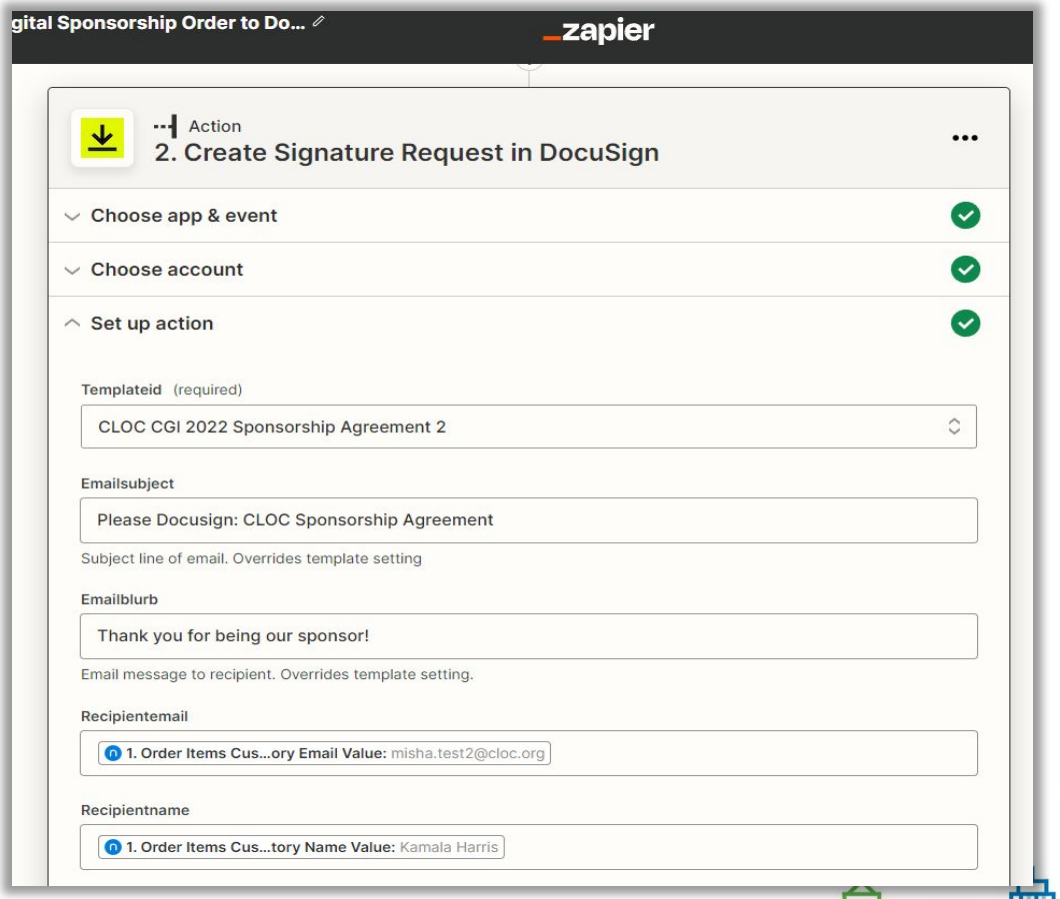
User Story 2: Automate requests for signature

Novi-to-Docusign automation

- **As a Sales and Sponsorships manager**, I want Sponsorship agreements to be sent for signature to the corporate representatives whenever they purchase any kind of sponsorship from Novi Store

- **SOLUTION**: Create a Zap that will be triggered when an item of certain type is purchased from the eStore. It will then pass the information provided by the buyer to DocuSign and request a document to be sent to the designated person for signature.


gital Sponsorship Order to Do...
zapier
Trigger
1. Order Created in Novi AMS
Choose app & event
Novi AMS Beta
Change
Event (required)
Order Created
Member Created
Instant
Triggers when a member is created.
Member Activity Created
Instant
Triggers when a member activity is created.
Order Created
Instant
Triggers when an order is created (with line item support).
Event Registration Created
Instant
Triggers when a Event Registration is created (with line item support).
Member Updated
Instant
Triggers when a member is updated.
Event Registration Updated
Instant
Triggers when a Event Registration is updated (with line item support).


gital Sponsorship Order to Do...
zapier
Action
2. Create Signature Request in DocuSign
Choose app & event
Choose account
Set up action
Templateid (required)
CLOC CGI 2022 Sponsorship Agreement 2
Emailsubject
Please Docusign: CLOC Sponsorship Agreement
Subject line of email. Overrides template setting
Emailblurb
Thank you for being our sponsor!
Email message to recipient. Overrides template setting.
Recipientemail
1. Order Items Cus...ory Email Value: misha.test2@cloc.org
Recipientname
1. Order Items Cus...tory Name Value: Kamala Harris

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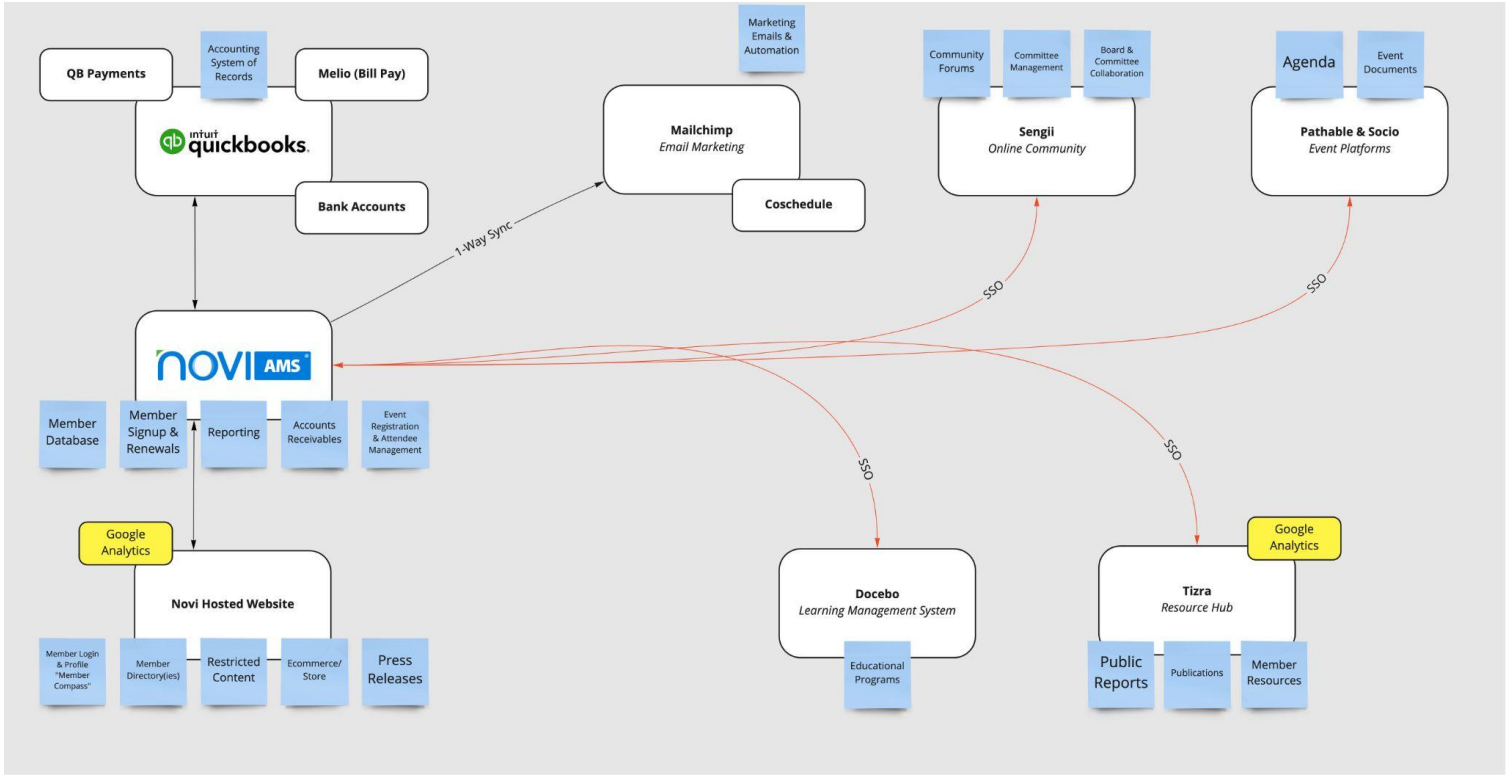
QB Payments
Accounting System of Records
Melio (Bill Pay)
intuit quickbooks
Bank Accounts
Marketing Emails & Automation
Mailchimp
Email Marketing
Coschedule
1-Way Sync
Community Forums
Committee Management
Board & Committee Collaboration
Sengii
Online Community
Agenda
Event Documents
Pathable & Socio
Event Platforms
SSO
SSO
NOVI AMS
Member Database
Member Signup & Renewals
Reporting
Accounts Receivables
Event Registration & Attendee Management
SSO
SSO
Google Analytics
Novi Hosted Website
Member Login & Profile "Member Compass"
Member Directory(ies)
Restricted Content
Ecommerce/ Store
Press Releases
Docebo
Learning Management System
Educational Programs
Google Analytics
Tizra
Resource Hub
Public Reports
Publications
Member Resources

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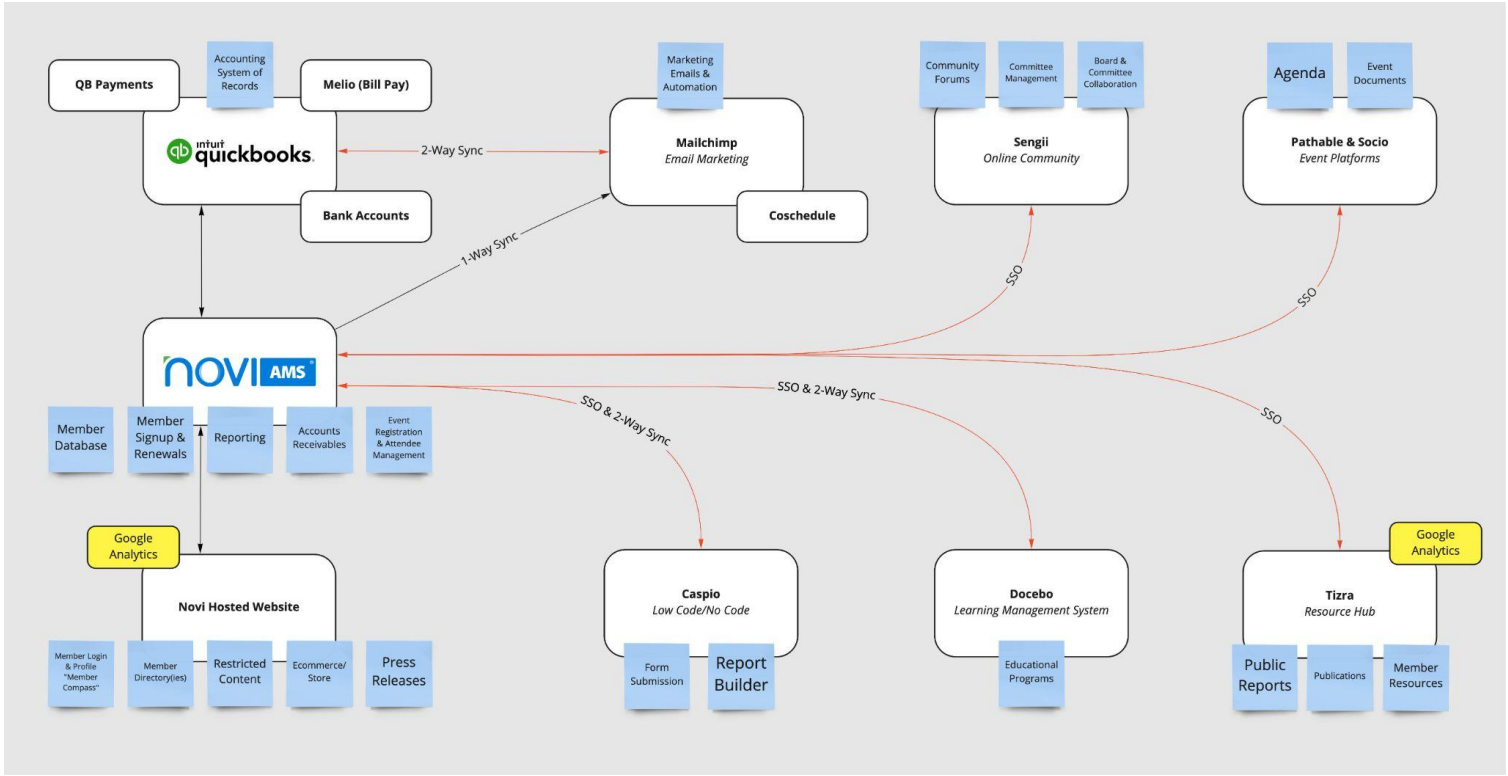
QB Payments
Accounting System of Records
Melio (Bill Pay)
quickbooks
Bank Accounts
2-Way Sync
Marketing Emails & Automation
Mailchimp
Email Marketing
Coschedule
1-Way Sync
Community Forums
Committee Management
Board & Committee Collaboration
Sengii
Online Community
Agenda
Event Documents
Pathable & Socio
Event Platforms
SSO
SSO
NOVI AMS
SSO & 2-Way Sync
SSO & 2-Way Sync
SSO
Member Database
Member Signup & Renewals
Reporting
Accounts Receivables
Event Registration & Attendee Management
Google Analytics
Novi Hosted Website
Member Login & Profile "Member Compass"
Member Directory(ies)
Restricted Content
Ecommerce/ Store
Press Releases
Caspio
Low Code/No Code
Form Submission
Report Builder
Docebo
Learning Management System
Educational Programs
Google Analytics
Tizra
Resource Hub
Public Reports
Publications
Member Resources

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