Personify®
MC Professional

# Zapier
# Product Webinar

Do More with Less: Building Smarter Workflows
with MC Professional and Zapier
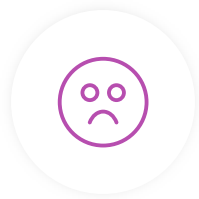
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# Housekeeping

### Recording

You will receive a link to the recording of today's Webinar.

### Issues

Don't panic!
Try logging out and logging back in.

### Questions?

Submit via the Q&A feature.

### Survey

Your feedback is important to us! Please take the survey at the end of today's Webinar.

# Let's Connect!

## VIRTUALLY

- Next Lunch & Learn: September 18
- In The Loop
  - Discussion boards, resources, best practices & MORE!
  - theloop.Personifycorp.Com/join
- The Click monthly newsletter
  - go.Personifycorp.Com/verification.Html

## IN-PERSON

- **August 9-12:** ASAE in Los Angeles + **Client Training & the Shindig!**
- **September 25:** VSAE Fall Conference in Richmond, VA
- **October 15:** FSAE Fall Expo in Tallahassee, FL
- **November 4-6:** RevUP 2025 in Annapolis, MD

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# An All-In-One AMS Solution



Membership Database

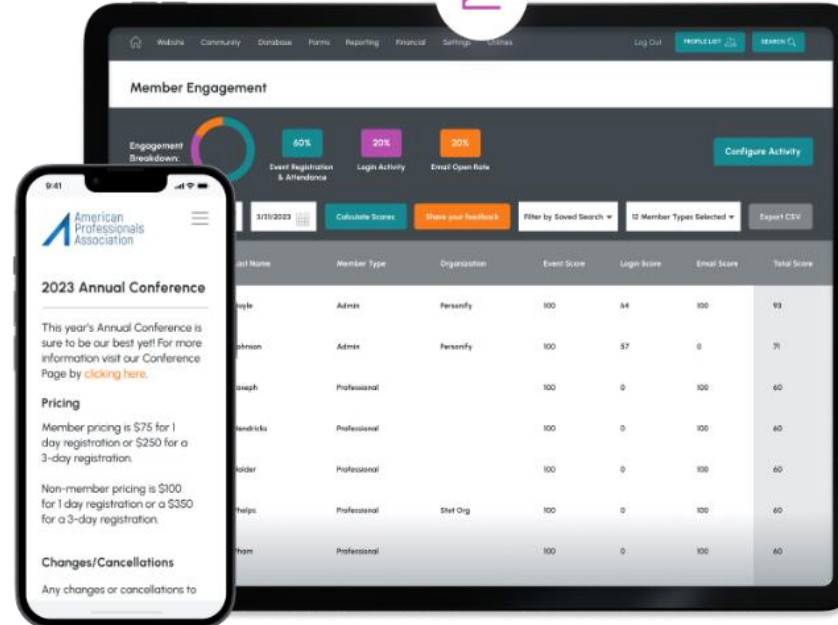Dues Renewals
& Member Applications

Email Marketing

Event Registration

Accounting &
Payment Processing

Member Website & CMS

# An Ecosystem of Connected Solutions

Our family of add-on solutions empowers you to select the combination of tools that meets your needs while ensuring you enjoy the simplicity of working with one dedicated partner



Personify
Job Board

Personify
CommUnity

Personify
Member App

Personify
Classroom

Personify
Registration Tech

# As your organization evolves, so should your tools. Effortlessly add what you need, when you need it.

## Job Board

Help your members find the job of their dreams (and earn extra revenue for your organization).

## Registration Tech

Drive member engagement at your events & annual meetings with our suite of event solutions.

## Classroom

Streamline member onboarding, professional certification and continuing education.

## CommUnity

Strengthen the relationship between you and your members with an online community.

## Member App

Manage membership with confidence and ease with an app that keeps member communication and data all in one place.

## New Premium Feature for MC Pro: Smart Newsletter

Automatically curate engaging, personalized newsletter content for members and prospects in a fraction of the time.

![Personify A2Z Events]

# A2Z Events

**Did you know that we also provide comprehensive event management solutions? A2Z Events offers a variety of tools that cover all your event needs, from regional conferences to large trade shows.**

Contact Database

Conference Management & Call for Proposals

Financial Management & Reporting

Sponsorship Management

Registration & Badge Management

Floor Plan Management

Exhibitor & Attendee Communications

Lead Retrieval & Attendance Tracking

![Personify MemberClicks]

# Webinar Tour Guide
# Rayne



- Product Manager

- Located in Toronto, Canada

- Love Yoga and Rock Climbing!

- Movie & Music nerd – currently watching Westworld

# Zapier

Do More with Less: Building Smarter Workflows with MC Professional and Zapier

# Agenda

- What is Zapier?

- Use Cases + Examples

- MC Pro Triggers and Actions

- Live Demo

- Client Zaps & Testimonials

- MC Pro + Zapier Improvements

- Questions!

# What is Zapier?

- Integrate MC Pro with 7,000+ apps

- No coding required

- Set up automated workflows to save time

# Understanding Zaps

- A Zap is an automated workflow that connects two or more apps to perform tasks automatically.

- Each Zap consists of a Trigger, which initiates the workflow, and one or more Actions that are executed in response.

- Triggers detect events in one app, while Actions execute tasks in another app based on the Trigger's event.

# MC Pro Use Cases

Financials

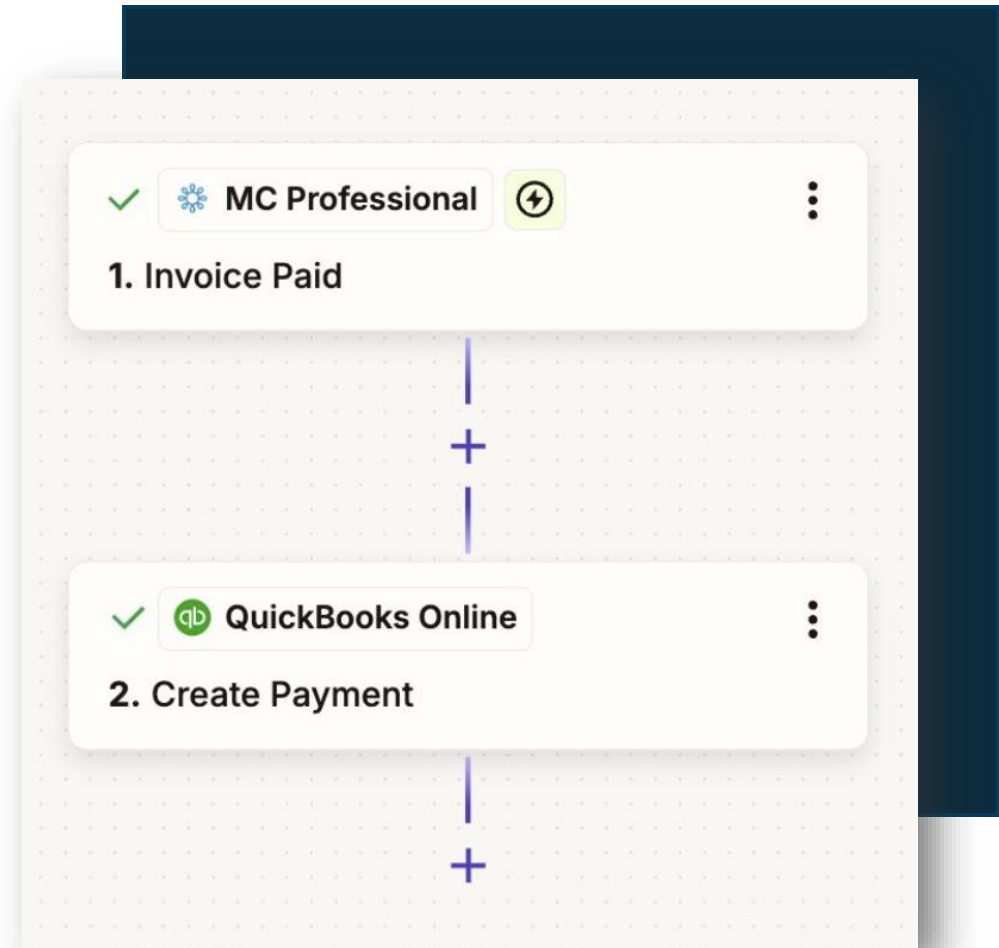Membership

Events

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# Use Case #1: Financials

When an invoice is paid in MC Pro, automatically generate a payment receipt in **QuickBooks Online**.

Reduce manual data entry errors & save time for financial admins

Ensure financial records stay up-to-date across all platforms

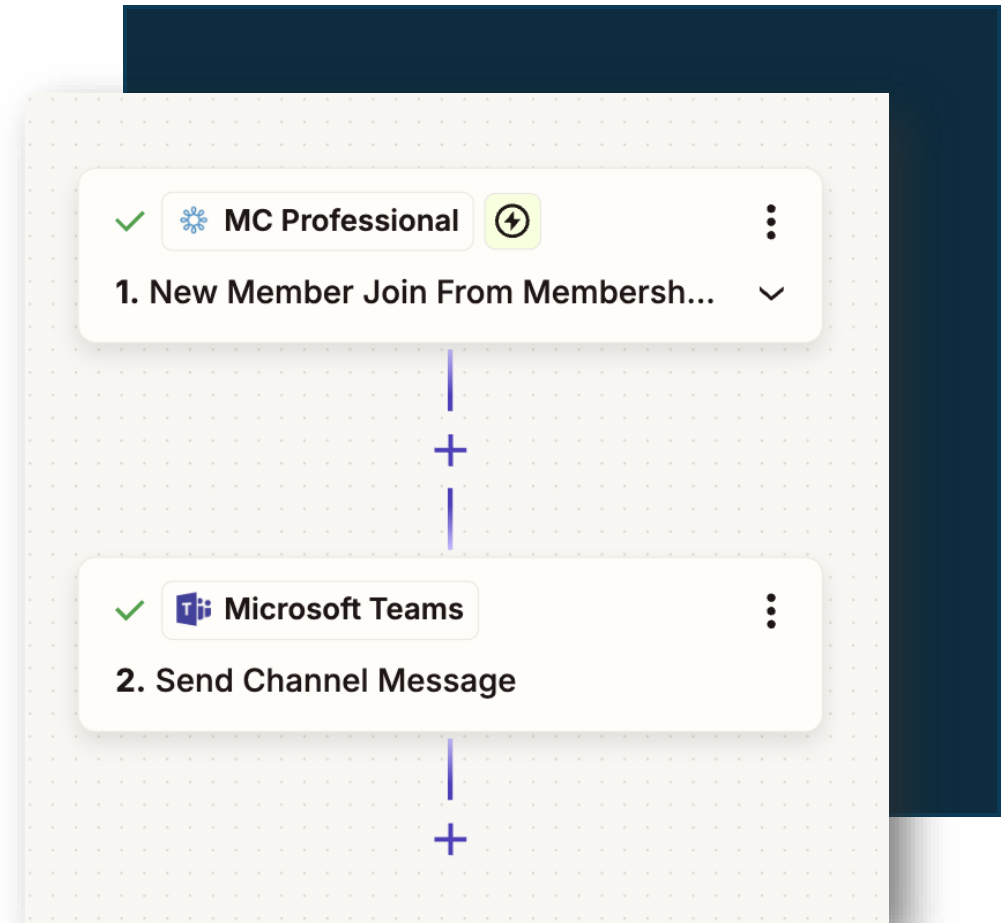Simplify reconciliation during reporting and audit periods

# Use Case #2: Membership

When a new member joins through a membership form, notify the admin team through **Teams**.

Increase moment-to-moment visibility of join volume without requiring frequent system login

Improve follow-up distribution among staff during high-volume join periods

Add a personal touch for new member joins



✓ ❄ **MC Professional** ⊘ ⋮

1. New Member Join From Membersh... ⌄

✓ ⊞ **Microsoft Teams** ⋮
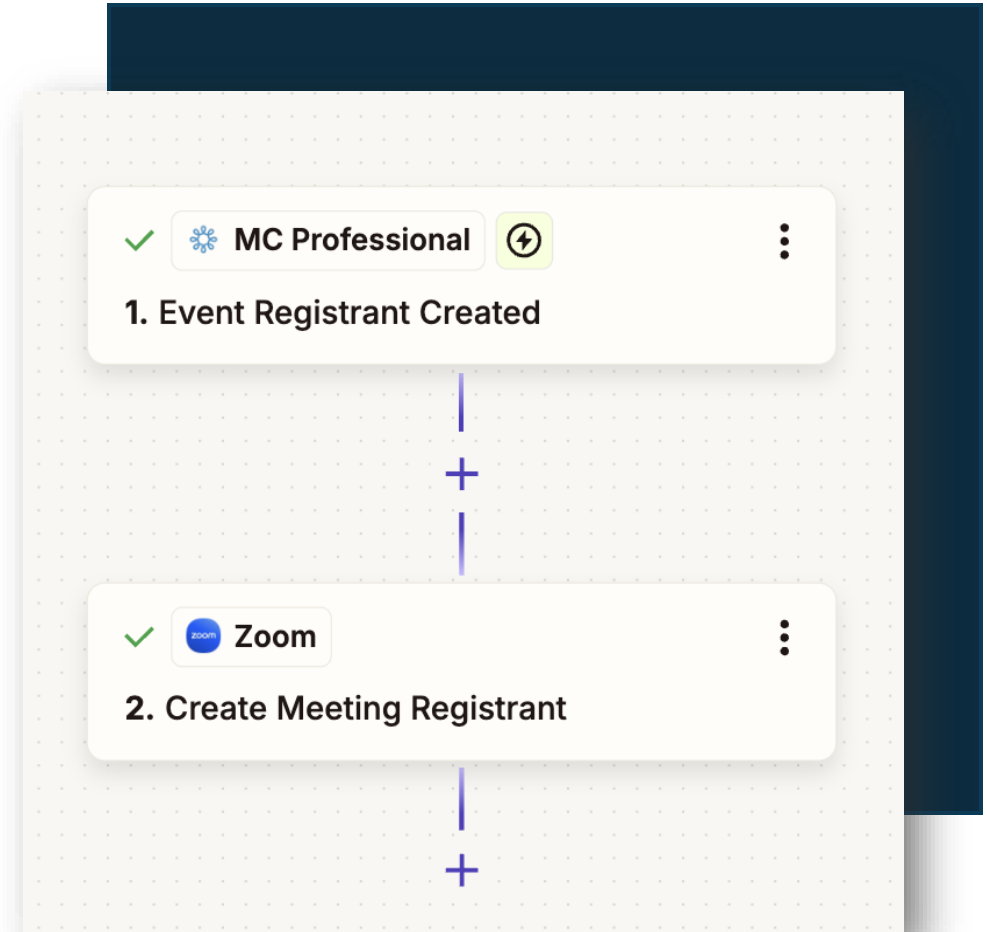
2. Send Channel Message

# Use Case #3: Events

When a member registers for an event, automatically add them to the registrant list for a webinar held in **Zoom**.

Minimize the risk of missing or incorrectly entered registrants

Reduce time spent by manually importing virtual event registrants to Zoom

Increased visibility for ongoing registration up to in-person and virtual events

# MC Pro Triggers & Actions

## Triggers

- Event registrant created
- Event registrant cancelled
- New member join from membership form
- Invoice created
- Invoice paid
- Invoice partial payment created
- Invoice voided
- Invoice refunded

## Actions

- Create continuing education credit
- Find profile **(new!)**

# MC Pro + Zapier Setup

**Set Up Checklist**

❑ Step 1: Access Zapier Account

❑ Step 2: Set up API Client

    ❑ Permission Scope: Read & Write

    ❑ Authorized Grant Types: Authorization Code & Refresh Token

    ❑ Redirect URI: https://zapier.com/dashboard/auth/oauth/return/McProfessionalCLIAPI/

    ❑ Organization Subdomain

❑ Step 3: Connect MC Pro to Zapier via API Client

    ❑ Client ID

    ❑ Client Secret

# Live Demo

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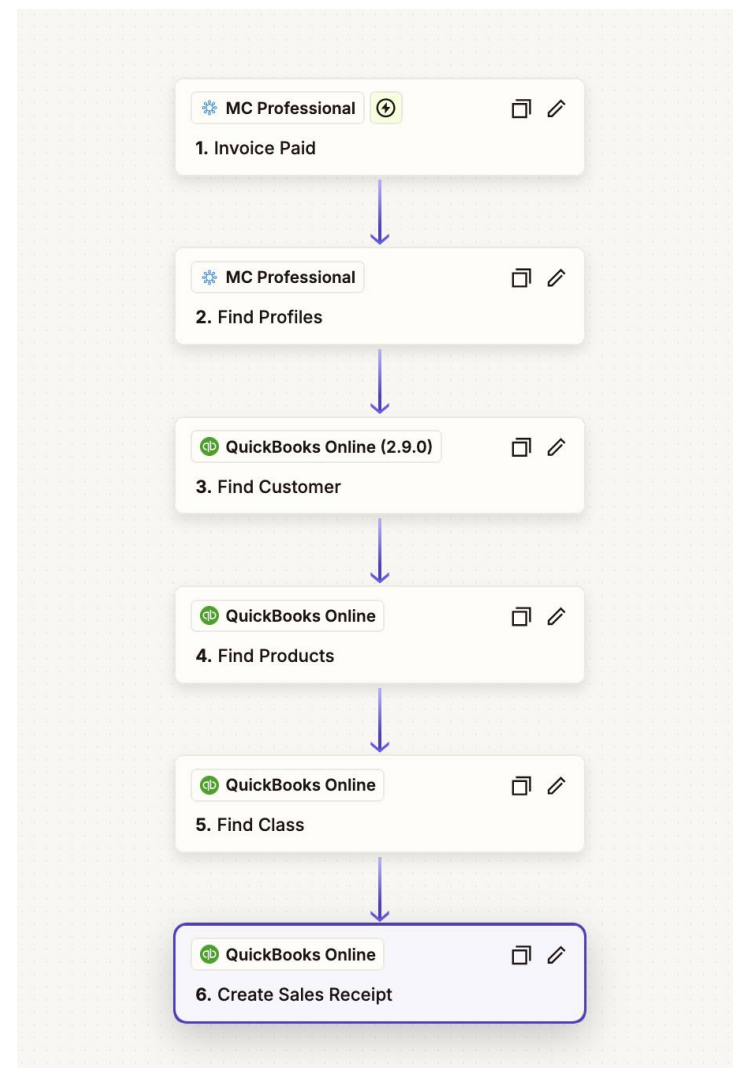
# Client Zaps in Action

*SAM's powerful, multi-step workflow that syncs invoice payments from MC Pro to Quickbooks Online.*

"This sync moves us forward in gaining efficiencies and boosting the level of our team. Not only will it decrease the time staff spends on data entry-level, repetitive tasks, but it will also remove a communication barrier that can often happen in telling a finance team what a member is paying for."

**- Tiffany Schwartz,** *Finance & Operations Director*

"I configured a Zap that will take the coding and amount from an individual line item and push it out to a Google sheet. I'm still refining it but it looks like a huuuuuuuuge time saver for everyone here with a MemberClicks client. It has already been worth it!"

**– Mike Breslin,** *Director of Association Management*



MC Professional
1. Invoice Paid

MC Professional
2. Find Profiles

QuickBooks Online (2.9.0)
3. Find Customer

QuickBooks Online
4. Find Products

QuickBooks Online
5. Find Class

QuickBooks Online
6. Create Sales Receipt

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# MC Pro & Zapier Improvements

## 2025 Improvements

First Name & Last Name Fields added to all Invoice/ Financial Triggers

Find Profile Action

Create Profile Action (coming soon!)

# What ways can you see Zapier increasing efficiency with your day-to-day tasks?

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# MC Professional Support & Resources

**Consult Zapier/MC Pro Help resources**

- [Zapier: Building an Integration](#)
- [Zapier: Triggers and Actions](#)
- [Zapier Applications](#)
- [Zapier Help Center](#)

**Reach out to Zapier Support for assistance**

- Live Chat
- Blogs

**Reach out to MC Pro support for assistance**

- Website:
  [help.memberclicks.com](http://help.memberclicks.com)
- Email:
  [help@memberclicks.com](mailto:help@memberclicks.com)

**Partner with our Services team for 1:1 training**

[https://memberclicks.com/professional-services-packages-pro/](https://memberclicks.com/professional-services-packages-pro/)

**You can find these links in the Zoom chat!**

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# Reminders

The on-demand webinar link will be emailed

Stay up to date about our Webinar schedule in the [Loop](#)!

Please share your feedback in our post Webinar survey

# Questions?

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# Thank you!

Don't forget to share your feedback and ideas in our survey following the Webinar.