



# Integration Made **Simple**



INTEGRATE YOUR AMS/CRM  
FOR MAXIMUM ORGANIZATION  
EFFICIENCY AND EASE

iMIS20

iBridge  
FOR iMIS

abila  
netFORUM

MemberClicks

Association  
Anywhere

MemberSuite™

salesforce

Personify

Microsoft  
Dynamics CRM

Aptify

QSAS  
STANDARD SAML

yourmembership<sup>®</sup>  
.com

# INTEGRATION MADE SIMPLE:

INTEGRATE YOUR AMS/CRM FOR MAXIMUM  
ORGANIZATIONAL EFFICIENCY AND EASE

## Table of Contents

<b>Introduction:</b> Integrations – The Simplest Way to Streamline Your Organization. . .	3
<b>Why Integrate</b> .....	4
<b>What to Integrate</b> .....	5
<b>Which Systems to Integrate</b> .....	7
<b>Who Integrates</b> .....	8
<b>Conclusion:</b> Take the Guesswork (and Other Work) Out of Integrations .....	9

# INTEGRATION BETWEEN YOUR AMS OR CRM AND EXTERNAL SYSTEMS IS IMPORTANT. REALLY IMPORTANT.

**Every day, your organization gains valuable information you can't afford to lose in the abyss of Excel spreadsheets or juggling multiple systems. That's where integrations come in.**

An AMS or CRM is the backbone of any successful organization. Not only does it store and organize valuable information, but it does so while increasing efficiency and eliminating systemic and data-centric redundancies. After all, you wouldn't invest in such a system if it didn't offer a robust array of functional tools to organize necessary tasks.

However, these systems *can't do it all*.

In fact, this is the very reason why you rely on third party software, like OpenWater, to manage tasks your current system can't. And while you can keep each system segmented, integration eliminates potential disasters, fees, and a healthy dose of frustration.

At OpenWater, we understand the underlying value of integration. This is why we not only promote integrations, but perform integrations on behalf of our customers as well. Likewise, we understand that integrations can be confusing. This guide addresses frequently asked questions to ensure you understand the value of integrations before proceeding with your own.

These questions include:

1. ***Why* should I integrate OpenWater with my AMS/CRM?**
2. ***What* are the most common integrations?**
3. ***Which* systems are supported with an OpenWater integration?**
4. ***Who* can perform my integration?**

Taking the time to better understand integrations before proceeding with your own is the key to making the most of your integrated system. With that, let's discuss the most important question of all: why should you integrate?



# WHY INTEGRATE

Your Association Management System can do a lot. But, can it efficiently manage your awards program? Probably *not*.

This is why you turn to systems like OpenWater to fill in the gaps and keep your organization on track.

When you have an external need – like awards management– you can't turn to just any system. You need a system that meets all awards workflow requirements and that can be integrated with your existing AMS or CRM. But, why integrate?

Integration is vital for three main reasons:

- 1. Ease of use for entrants/applicants, particularly with login processes**
- 2. Reduction in siloed data**
- 3. Elimination of the need for external programs, like Excel, to bridge the gap between systems**

Integration allows both systems to have an ongoing conversation and work together to automate tasks, reduce data redundancies and break down data siloes for better engagement and lower costs for your organization.

Now that you understand the inherent value of integration, it's important that you also learn *what* you can integrate should you choose to do so. Each of the four common integrations on the following page correlates to the reasons for/ benefits mentioned above.



# WHAT TO INTEGRATE

## **Single Sign-On (Login and Authentication + Member Status)**

Single Sign-On (SSO) allows users – entrants, judges, committee members, and others alike – to use their existing username and password to sign in to your system. This eliminates the unnecessary step of creating a new profile just to enter an awards program or accomplish another straightforward task.

After SSO integration, other options become available, including:

- Member-only discounts
- Restriction/blocking for entry to a member-only award; and
- Member status workflows

## **Pre-Populate Data (AMS to OpenWater)**

Your AMS already contains data entrants could use in their application form. This includes common information such as company name, job title, or something as simple as an address. And, by integrating your AMS with OpenWater, you can pre-fill the information you already have for users, saving them time and frustration.

All AMS fields can be mapped on a one-to-one basis with OpenWater fields. Where one-to-one correlation isn't possible, we support custom mappings to further simplify the entry process for users. Some of the custom mappings we've previously implemented include:

- Membership Status to an Individual's Company's Membership Status instead of their own
- Custom fields (e.g. School Name) to the Company/Organization Field if entrants are all schools
- CV/Resume to the Photo field

The possibilities are limitless and can be customized to suit the unique needs of your organization.



## NOMINATION LOOKUP (AMS to OpenWater)

Nominators often use OpenWater to nominate a member of their organization for an award. In some cases, members must be of a certain standing or meet other requirements to qualify for the award.

In the past, staff members were required to manually check each entry for these requirements by comparing the AMS to each nomination. OpenWater automates the process by allowing nominators to find the member they wish to nominate in the system itself. Because an organization can restrict eligible members, there's no need to waste time and money paying a staff member to manually check each entry any longer.



## ACTIVITY PUSH (OpenWater to AMS)

You can push data from OpenWater into the AMS whenever you want. One reason you may want to do this is to add information gained in OpenWater to AMS member profiles. For example, if you charge an entry fee and want the transaction information pushed into profiles for reporting purposes, you can do so through integration. Other useful examples of activity push include organizations that want to know which people or companies have applied to their awards in the past or those who want to flag previous winners.

OpenWater is easily customizable to suit any data-driven needs from our software to your AMS.



# WHICH SYSTEMS TO INTEGRATE

Since day one, OpenWater has taken systems integrations seriously. By doing so, we now support industry-leading CRMs and AMSs, including yours.

In the chart below, you'll find all the systems we've previously integrated with. Please note that the left column designates all supported systems whereas the right column indicates where we are currently able to write data from OpenWater into your AMS/CRM.

ALL SUPPORTED SYSTEMS (AMS to OpenWater)	ACTIVITY PUSH (OpenWater to AMS)
<ul style="list-style-type: none"><li>• Aptify</li><li>• Altai</li><li>• Association Catalyst</li><li>• iMIS</li><li>• Infusionsoft</li><li>• MemberMax</li><li>• MemberNation</li><li>• Microsoft Dynamics</li><li>• netFORUM Professional</li><li>• netFORUM Enterprise</li><li>• Timberlake</li><li>• HubSpot</li><li>• Active Directory by Microsoft</li></ul>	<ul style="list-style-type: none"><li>• Aptify</li><li>• iMIS</li><li>• MemberSuite</li><li>• Personify</li><li>• netFORUM Enterprise (Abila)</li><li>• Microsoft Dynamics</li><li>• Salesforce</li></ul>

**Note:** Since writing this guide, it's likely we've added supported systems. Please ask a sales representative about your specific request if your system isn't in this chart.



# WHO INTEGRATES

At OpenWater, we like to do our own dirty work.

If you're looking to integrate your AMS or CRM with the OpenWater system, we're the people to turn to.

When you turn to our team for integrations, you'll receive:

- A **guarantee** that the systems are talking to each other efficiently
- An **ongoing commitment** to keep your systems talking to each other
- A **one-stop partner** in all matters related to awards and integration

Our step-by-step process is straightforward and allows for quick, efficient integration to get your organization on track as soon as possible:

1. **Assess and document all integration needs**
2. **Evaluate the connection between the systems**
3. **Collaborate with all necessary parties to get data out and pushed to the right places**
4. **Write the final integration code**
5. **Host it for testing 6x daily**

This process ensures all your needs are met while maintaining efficiency over time. And, because our integrations run self-tests and subsequently pause and alert appropriate parties when necessary, we're always working – even if a physical member of our team isn't.



# Taking the Guesswork (and Other Work) Out of Integrations

Integrations may seem complex. However, with the support of the entire OpenWater team and a hands-off approach that allows you to enjoy the benefits of integration without the hassle of hiring a developer and implementing it yourself, the process is quicker and simpler than many believe it to be.

Remember, integration allows each of your various platforms to engage with one another. This reduces wasted time, money, and other resources you currently spend to centralize and organize data. Moreover, it will sustain growth as your organization, through efforts like your awards program, broadens in reach over time.

If you're interested in integration, please contact an OpenWater sales representative to learn more. When you decide to integrate with OpenWater, you'll coordinate with one of our senior engineers directly to begin the process and work with the same individual through completion and beyond.



## About OpenWater

OpenWater is an awards management software platform that automates and helps to grow your awards and recognition programs. Our platform supports thousands of organizations in hundreds of industries.

[Learn More!](#)



WE INTEGRATE YOUR AMS



AND HELP ASSOCIATIONS OF ALL SIZES

