

iMIS 101

An *iMIS* Overview



Relationship Management

Gather data on individual tastes, preferences, & behavior patterns

Create & distribute targeted messages

Create new revenue opportunities and manage transactions

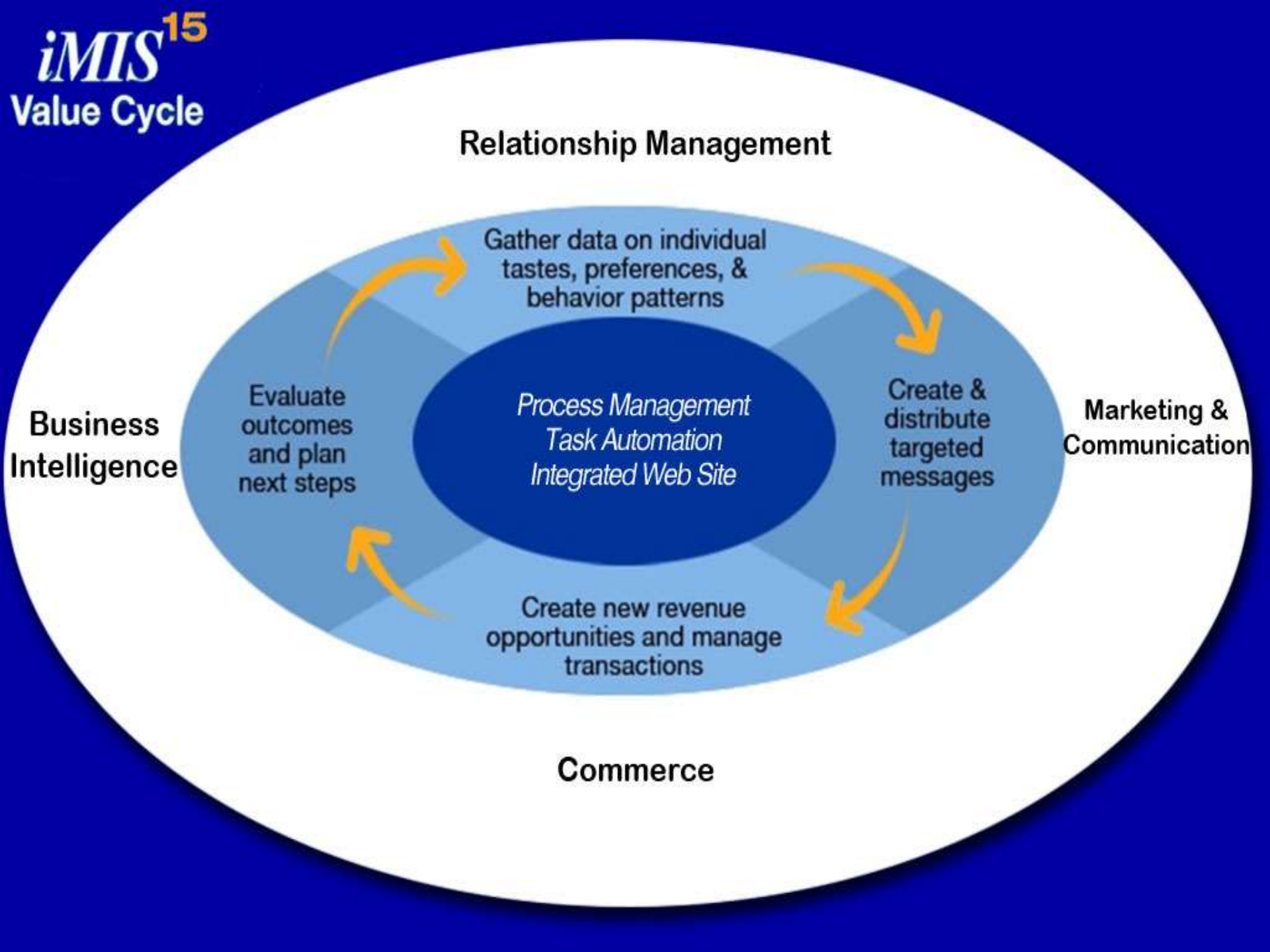
Evaluate outcomes and plan next steps

Process Management
Task Automation
Integrated Web Site

Business Intelligence

Marketing & Communication

Commerce



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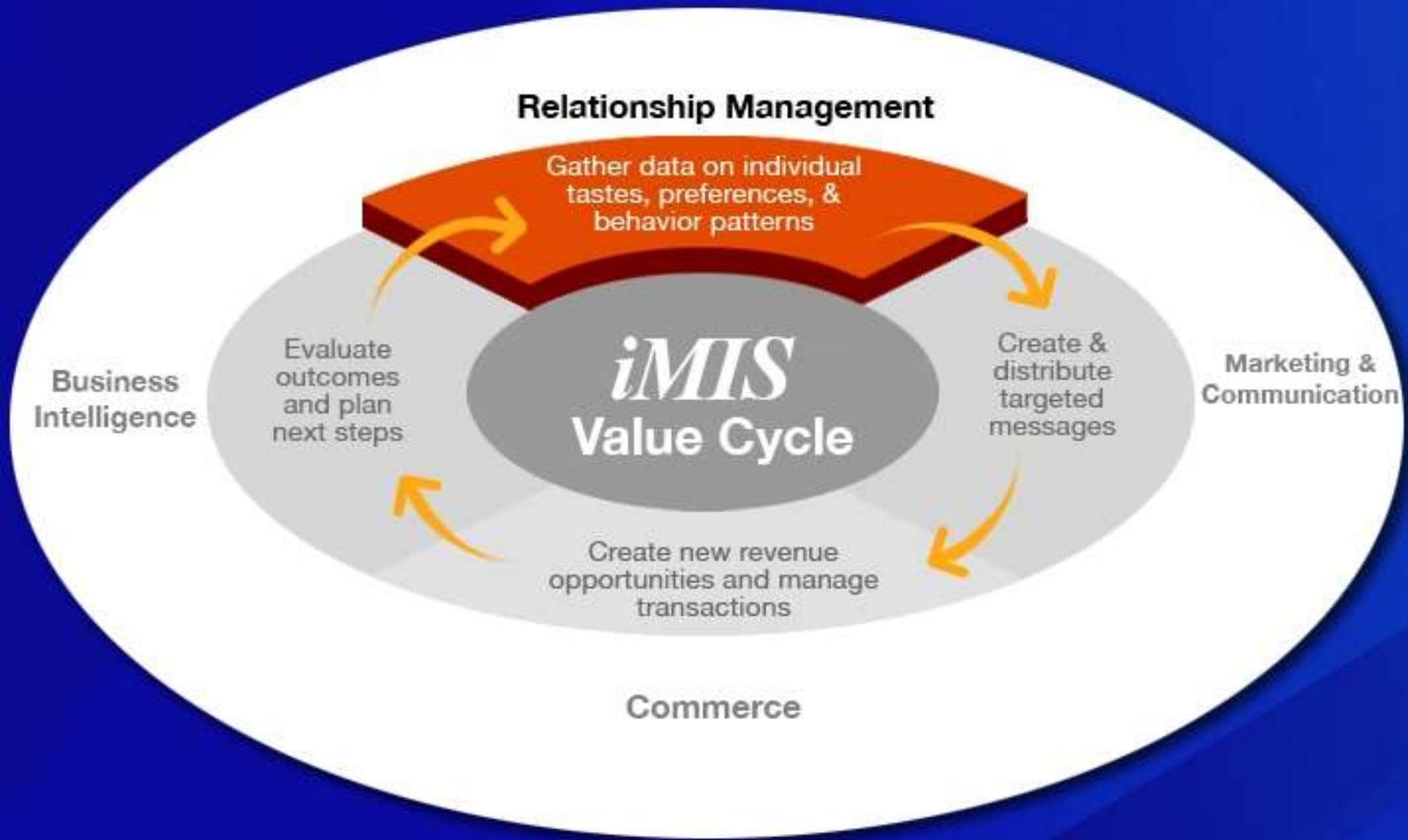
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Business Intelligence

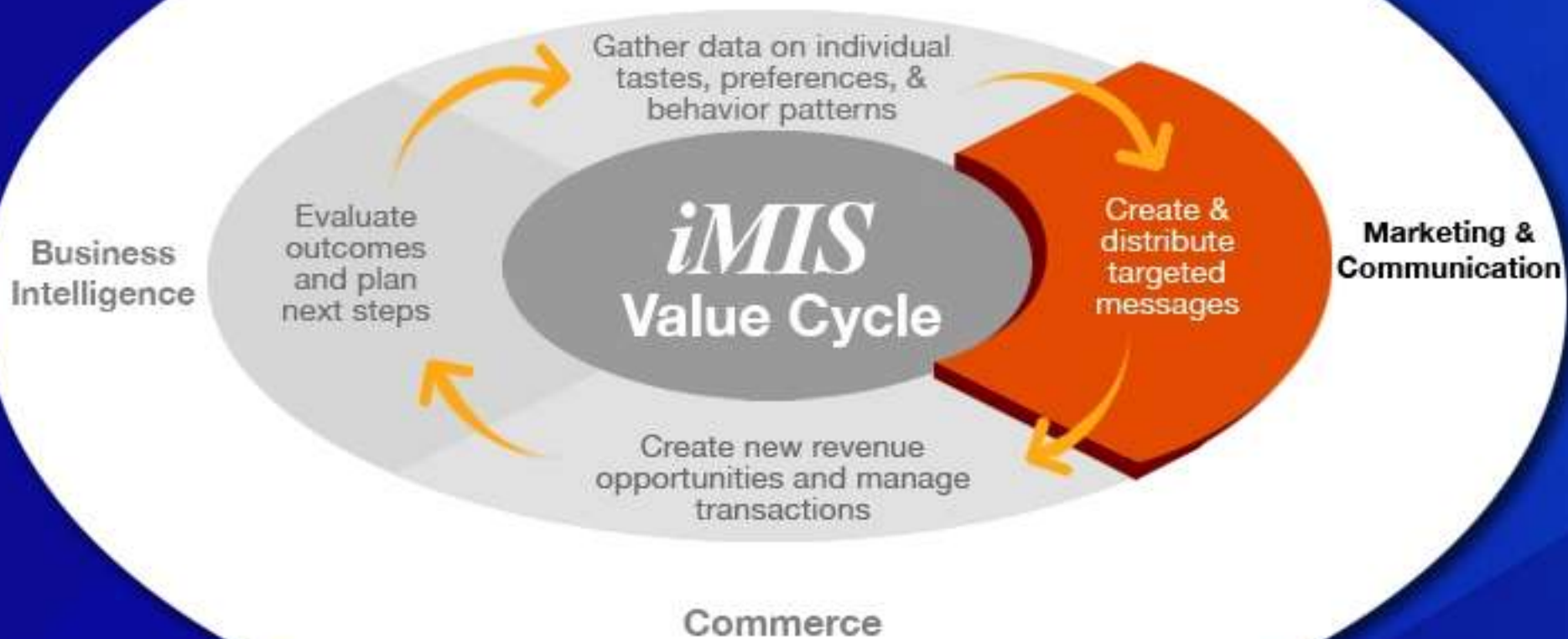
Marketing & Communication

iMIS
Value Cycle

Commerce



Relationship Management



Marketing & Communication

Business Intelligence

Commerce

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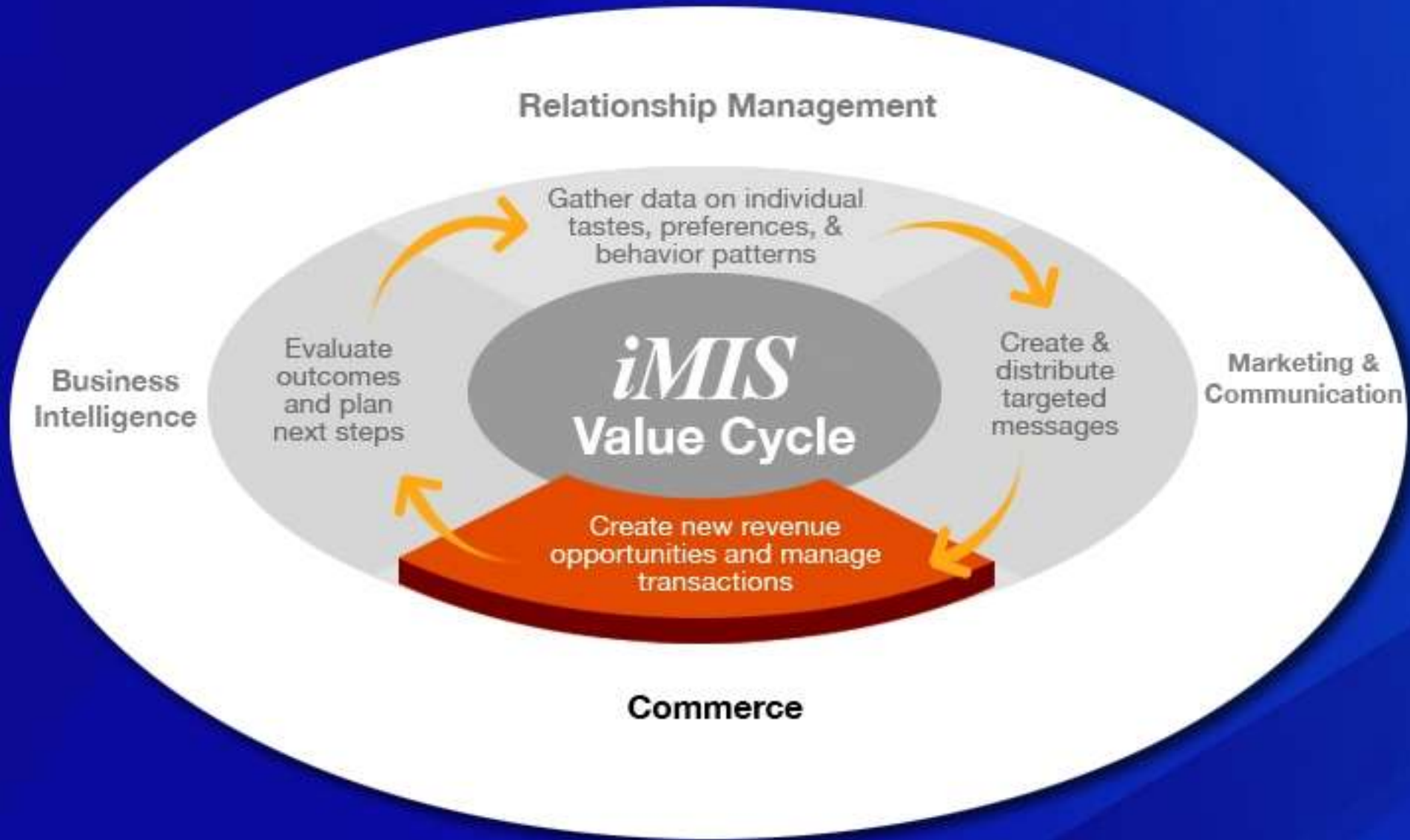
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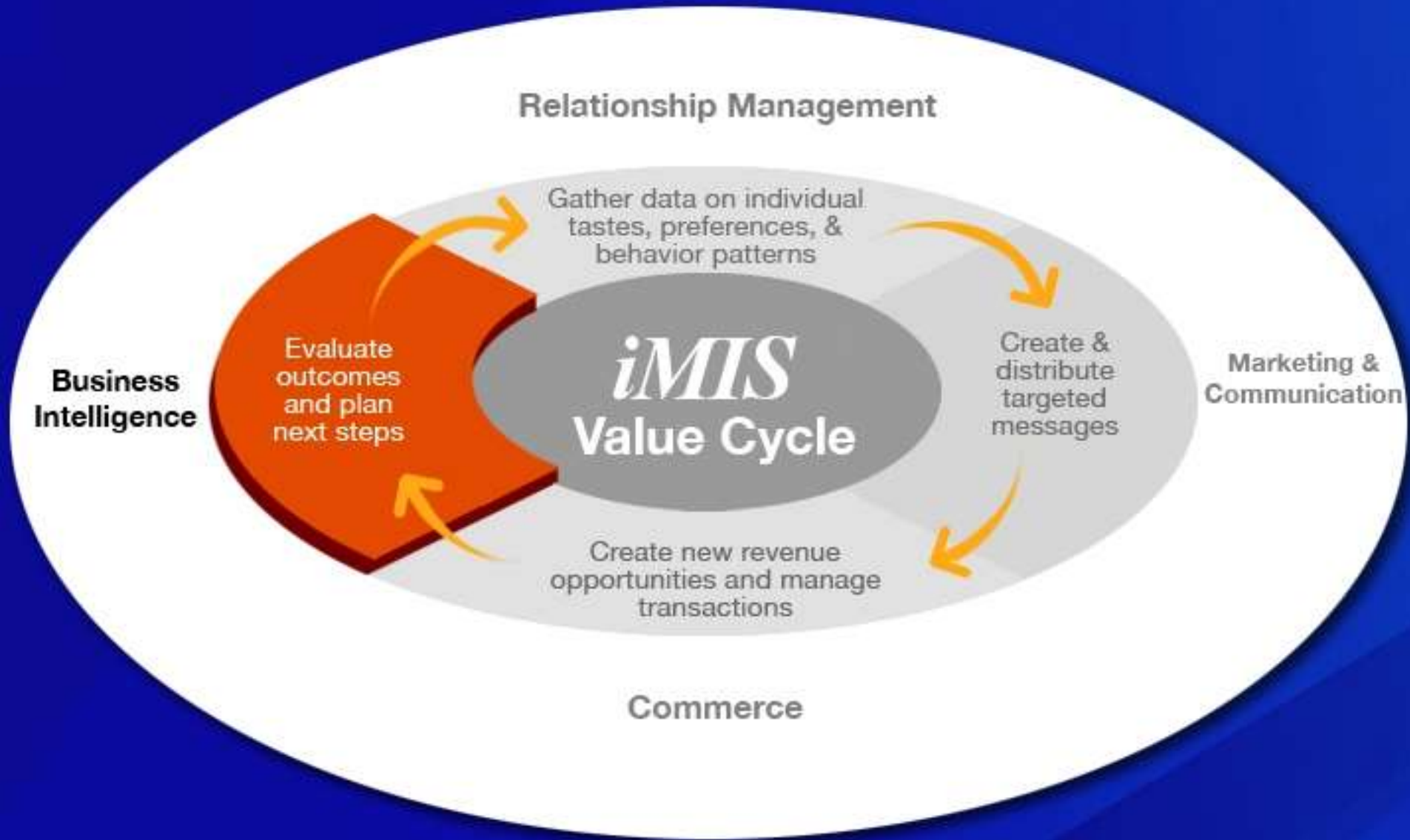
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- Let's take a look

Different User Profile examples

10000 Mr. Christopher Baker (iMIS Business Framework)

File Edit Cmds Xtenders CSA Help



Home **Contacts** Donations EFT Events Finance Business Intelligence Orders

Manage Contacts Individual - Mr. Christopher Baker

ID 10000 Individual Active Ambassador

Mr. Christopher M Baker Suffi:
Chris Designation Office Manager

Organisation 10015 All Saints Church Mitcham, (CH)
317 Mitcham Rd, Mitcham, VIC 3132
All Saints Church Mitcham Organisation Sort
ALL SAINTS CHURCH M

Work Home Seasonal New
Address 317 Mitcham Rd
Verify Address Address 2 Status
Address 3
Mitcham VIC 3132
Country
Preferred Mail Bill Ship
Phone (03) 9445-6734 Fax (03) 9222-1115
E-mail cbaker@imisdemo.com

Profile Status Picture
Work Phone (03) 9445-6734
Home Phone (099) 345-9875
Fax (03) 9222-1115
Mobile
E-mail cbaker@imisdemo.com
Web Address www.saildreams.com
Household ID 17977

Results Record History Activities-All Calls Linked Records Relationships Fundraising

| ID | Last Name | First Name | Middle Name | Member Type | Category | Organisation | City |
|---------|-----------|-------------|-------------|-------------|----------|-----------------------|---------|
| ▶ 10000 | Baker | Christopher | | M | AMB | All Saints Church Mit | Mitcham |

New Delete Find Print User Credentials 1 result returned.

Save Cancel



Manage Gifts & Pledges

New Open Edit Delete

| Donor | Address | Pledges | Gifts |
|--|--|--|---|
| 10000 Mr. Christopher Baker Office Manager (099) 345-9875 | All Saints Church Mitcham 317 Mitcham Rd Mitcham, VIC 3132 | Largest 1000000.00 Last 22/09/2008 Lifetime 275250.00 Balance 726320.00 | Largest 5000.00 Last 10/08/2009 Lifetime 23314.94 |

Overview Donor Acknowledge Tribute Split Gifts Notes Installments Matching Soft Credit Premiums

Standard Gift Entry Mode

Follow Up

Gift Aid?

Gift Info

ID

Transaction Date

Date Received

Gift Type

Gift Amount

Apply to

Request

Distribution

Appeal

Campaign

Fund

Details

List as

Solicitor

Soft Credit

Payment Info

Payment Type/In-kind/Asse In-kind Description

Credit Card Number CSC Exp Name on Credit Card

Authorization

Receipt Number not Print Receipt

Transaction Usual Cost Matching Transaction Matching Request

- Donations
- Manage Gifts & Pledges
- Rapid Gift Entry
- Manage Payments
- Manage Requests
- Manage Adjustments
- Process Premiums
- Appeal Expenses
- Reports
- Executive Reports
- Query Tool
- Fundraising help



Register a customer

New Open Edit Delete

Registrant **Company/Address** **Bill To Information**

- Events**
- Register a customer
- Generate reports
- IOA

- Events help

Overview Attendee Other Payments Badges Function Note Account info

Order Summary

Order **Event**

Date

Source Code

Registrant Summary

ID Add

Class

Status

Payment Summary

| | | | |
|---------|------|-----------------------|----------------------|
| Charged | 0.00 | Purchase Order | <input type="text"/> |
| Tax | 0 | Bill To | <input type="text"/> |
| Total | 0.00 | | |
| Paid | 0.00 | | |
| Balance | 0.00 | | |

| Function | Qty | Price |
|----------|-----|-------|
| | | |

Original source = * = On Wait List

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