Process Automation & Communications

Jeff Spring, ASI
AGENDA

Understanding Process Automation and Communications

Who is this guy?

Why is he up there talking like he knows something? Why does he talk funny?

iMIS Process Automation

Automate repetitive processes, strategically engage members/donors to keep them active in your organization.

iMIS Communications

Communicate with members/donors directly from iMIS. Plus provides statistical tracking and deliverability benefits.
Who is this guy?
Jeff Spring - Sr. Product Manager - ASI

• Coming up on 5 years with ASI
  – I work with customers, partners, consultants, NiUG to prioritize the backlog
  – I work with teams to get the work done

• 17 years as AiSP in Seattle
  – Started with iMIS LAN 3.0b. Don Robertson taught most of my first training class
  – Installed one of (if not the first) iMIS Client/Server

• Live in Austin, TX
  – Enjoying exploring BBQ, local breweries, rodeos
  – By far the least Texas person in TX
Process Automation
What can we do with it?

- Alert users to actions that need to be taken
- Provide your constituents with personalized content
- Keep constituents engaged and returning to your site
- Automatically distribute documents, such as letters, receipts, confirmations, etc., to constituents
- Automatically update data as part of a process
Process Automation examples

Product revenue
4,470
Last year's total: 10,884

Product orders
29
Last year's count: 33

Products sold
155
Last year's count: 1,158

Unique customers
24
Last year's count: 25

Product sales by member type

Product sales by category

Low inventory
Travel Mug: Green Stainless Steel: 0

Popular products this month
Association CEO's Guide: 1 sold
Certification Handbook: 1 sold
Creating a New Business: 1 sold
Industry Certification Application: 1 sold
Fee: 1 sold
Standard

A limited license to use Out-of-the-Box automated alerts is provided as part of the base iMIS license. Allows use of:

• Predefined automated alerts
• Included Scheduled email tasks such as...
  – New member welcome
  – Event confirmation email
• Activate/deactivate tasks and alerts
• No modifications to the tasks or alerts
  – You can modify underlying queries and communication templates
    Beware of upgrade implications
Process Automation Standard or Plus
Which is right for you?

Complete control of Process Automation
• Define and create unlimited number of tasks
• Define and create unlimited number of alerts
  – Create customized content according to your own rules
• Tasks based on database activity or schedule for...
  – SQL stored procedures
  – emails
  – reports
### Process Automation

#### Let's take a look - Tasks

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Type</th>
<th>Enabled</th>
<th>Date Created</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Staff volunteer history and upcoming summary</strong></td>
<td>Displays a summary of the number of volunteers who recorded attendance for the last 7 days and volunteers who are planning on attending in the next 7 days.</td>
<td>Alert display</td>
<td>✓</td>
<td>2/25/2016 2:31:19 PM</td>
</tr>
<tr>
<td><strong>Staff volunteer background checks pending approval</strong></td>
<td>Creates an alert with a count of volunteer background checks needing approval.</td>
<td>Alert display</td>
<td>✓</td>
<td>2/25/2016 2:30:06 PM</td>
</tr>
<tr>
<td><strong>Staff volunteer attendance pending approval</strong></td>
<td>Creates an alert with a count of volunteer attendances needing approval.</td>
<td>Alert display</td>
<td>✓</td>
<td>2/25/2016 2:27:15 PM</td>
</tr>
<tr>
<td><strong>Staff new volunteers alert</strong></td>
<td>Creates an alert listing new volunteers available within 7 days either direction.</td>
<td>Alert display</td>
<td>✓</td>
<td>2/25/2016 2:25:43 PM</td>
</tr>
<tr>
<td><strong>Calculate engagement scores</strong></td>
<td>Run periodically to calculate engagement scores. Calculation will not include data from the current day.</td>
<td>Scheduled task</td>
<td></td>
<td>1/7/2016 3:36:14 PM</td>
</tr>
<tr>
<td><strong>Content and Navigation Workflow</strong></td>
<td>Sends expiration notices and removes content and navigation that has expired.</td>
<td>Scheduled task</td>
<td></td>
<td>12/2/2015 11:10:10 AM</td>
</tr>
<tr>
<td><strong>Event confirmation email</strong></td>
<td>Sends a confirmation email to event registrants when they submit their registration.</td>
<td>Scheduled task</td>
<td></td>
<td>8/20/2015 12:47:24 PM</td>
</tr>
<tr>
<td><strong>Missing mobile phone alert</strong></td>
<td>Creates an alert if the selected contact has no mobile phone.</td>
<td>Alert display</td>
<td>✓</td>
<td>8/19/2015 3:59:01 PM</td>
</tr>
</tbody>
</table>
## Process Automation

### Let’s take a look - Alert Sets

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automatic membership renewals</td>
<td>Used to display alerts to staff regarding enrollments in automatic membership renewal.</td>
</tr>
<tr>
<td>Commerce Dashboard</td>
<td>Alerts that appear on the Commerce dashboard in the Staff site</td>
</tr>
<tr>
<td>Community Dashboard</td>
<td>Alerts that appear on the Community dashboard in the Staff site</td>
</tr>
<tr>
<td>Events Dashboard</td>
<td>Alerts that appear on the Events dashboard in the Staff site</td>
</tr>
<tr>
<td>Fundraising Dashboard</td>
<td>Alerts that appear on the Fundraising dashboard in the Staff site</td>
</tr>
<tr>
<td>Join Alert</td>
<td>Alert used to display on Company Administrator organization account page</td>
</tr>
<tr>
<td>Member alerts</td>
<td>Alerts that display to public users on the home page and on their account page</td>
</tr>
<tr>
<td>Membership Dashboard</td>
<td>Alerts that appear on the Membership dashboard in the Staff site</td>
</tr>
<tr>
<td>Organization administrator alerts</td>
<td>Alerts that display to organization administrators on the organization's account page</td>
</tr>
<tr>
<td>Quick Start Member alerts</td>
<td>Sample member-facing alerts for use in the Quick Start sites</td>
</tr>
<tr>
<td>Staff account page alerts</td>
<td>Alerts that appear on the account page which staff users see</td>
</tr>
<tr>
<td>Staff organization account page alerts</td>
<td>Alerts that appear on the organization account page which staff users see</td>
</tr>
</tbody>
</table>
## Process Automation

Let's take a look - Logs

### Process automation

<table>
<thead>
<tr>
<th>Task</th>
<th>Status</th>
<th>Start</th>
<th>End</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task Log Cleanup</td>
<td>Succeeded</td>
<td>8/15/2016 10:10:14 AM</td>
<td>8/15/2016 10:10:15 AM</td>
</tr>
<tr>
<td>Refresh Dynamic Groups - Daily</td>
<td>Succeeded</td>
<td>8/15/2016 3:05:00 AM</td>
<td>8/15/2016 3:05:05 AM</td>
</tr>
<tr>
<td>Task Log Cleanup</td>
<td>Succeeded</td>
<td>8/14/2016 10:10:14 AM</td>
<td>8/14/2016 10:10:15 AM</td>
</tr>
<tr>
<td>Refresh Dynamic Groups - Weekly</td>
<td>Succeeded</td>
<td>8/14/2016 4:05:00 AM</td>
<td>8/14/2016 4:05:00 AM</td>
</tr>
<tr>
<td>Refresh Dynamic Groups - Daily</td>
<td>Succeeded</td>
<td>8/14/2016 3:05:00 AM</td>
<td>8/14/2016 3:05:04 AM</td>
</tr>
<tr>
<td>Refresh Dynamic Groups - Daily</td>
<td>Succeeded</td>
<td>8/13/2016 3:05:00 AM</td>
<td>8/13/2016 3:05:03 AM</td>
</tr>
<tr>
<td><strong>New member welcome email</strong></td>
<td>Succeeded</td>
<td>8/12/2016 5:12:01 PM</td>
<td>8/12/2016 5:12:03 PM</td>
</tr>
<tr>
<td>Task Log Cleanup</td>
<td>Succeeded</td>
<td>8/12/2016 10:10:15 AM</td>
<td>8/12/2016 10:10:16 AM</td>
</tr>
<tr>
<td>Refresh Dynamic Groups - Daily</td>
<td>Succeeded</td>
<td>8/12/2016 3:05:00 AM</td>
<td>8/12/2016 3:05:04 AM</td>
</tr>
</tbody>
</table>
Alerts/Personalized content
Alerts/Personalized content

What is it?

- Visual signal to staff and members encouraging them to take action
- Content displayed to a user based on engagements
  - Expiring membership
  - Balance due
  - Event registration reminder
  - Upcoming events
  - and more!
- Can be displayed to staff or public users in any RiSE site

- **Webinar Series: Industry Ethics** is coming up on **November 12**
- **Leadership Summit** is coming up on **December 01**

⚠️ You have an outstanding account balance of $2,117.00 against 4 invoices. To see details [Click here].
# Alerts

**Included with Q4 2015 Release**

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Missing mobile phone alert</td>
<td>Creates an alert if the selected contact has no mobile phone.</td>
</tr>
<tr>
<td>Staff low inventory alert</td>
<td>Creates an alert listing products which have low inventory.</td>
</tr>
<tr>
<td>Staff recent orders alert</td>
<td>Creates an alert listing orders placed today.</td>
</tr>
<tr>
<td>Staff popular products this month alert</td>
<td>Creates an alert listing the products with the highest quantity purchased this month.</td>
</tr>
<tr>
<td>Staff recent event registrations alert</td>
<td>Creates an alert listing the 10 most recent event registrations.</td>
</tr>
<tr>
<td>Staff low event registration alert</td>
<td>Creates an alert when an event starts soon and has low registration.</td>
</tr>
<tr>
<td>Staff regular pricing cutoff alert</td>
<td>Creates an alert when the regular registration pricing for an event will end within 7 days.</td>
</tr>
<tr>
<td>Staff early pricing cutoff alert</td>
<td>Creates an alert for the selected event when the early registration pricing will end within 7 days.</td>
</tr>
<tr>
<td>Staff online registration closes soon alert</td>
<td>Creates an alert when the online registration for an event closes within 7 days.</td>
</tr>
<tr>
<td>Staff online registration opens soon alert</td>
<td>Creates an alert when the online registration for an event opens within 7 days.</td>
</tr>
<tr>
<td>Staff upcoming event alert</td>
<td>Creates an alert for each event that begins within the next 15 days.</td>
</tr>
<tr>
<td>Staff dropped or reinstated members alert</td>
<td>Creates an alert for members who have been dropped or reinstated recently.</td>
</tr>
<tr>
<td>Staff major donor gifts alert</td>
<td>Creates an alert displaying recent gifts from the current user's major donor.</td>
</tr>
<tr>
<td>Staff recent large gifts alert</td>
<td>Creates an alert listing recent gifts of 500.00 or more.</td>
</tr>
<tr>
<td>Staff recent gifts alert</td>
<td>Creates an alert listing recent gifts under 500.00.</td>
</tr>
</tbody>
</table>
## Alerts (pt 2)

### Included with Q4 2015 Release

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff recent renewals list alert</td>
<td>Creates an alert listing the members who have renewed in the past 7 days.</td>
</tr>
<tr>
<td>Staff recent renewals summary alert</td>
<td>Creates an alert with a count of members who have renewed in the past 7 days.</td>
</tr>
<tr>
<td>Staff new joins alert</td>
<td>Creates an alert for members who have joined today.</td>
</tr>
<tr>
<td>Staff lapsing members list alert</td>
<td>Creates an alert listing members whose memberships expire within 7 days.</td>
</tr>
<tr>
<td>Staff lapsing members summary alert</td>
<td>Creates an alert with a count of members whose memberships expire within 7 days.</td>
</tr>
<tr>
<td>Staff new contacts alert</td>
<td>Creates an alert listing new contacts created in the last 7 days.</td>
</tr>
<tr>
<td>Staff new users alert</td>
<td>Creates an alert listing new users (contacts with usernames) created in the last 7 days.</td>
</tr>
<tr>
<td>Duplicate Contact Alert</td>
<td>Alerts staff that a duplicate contact record may exist</td>
</tr>
<tr>
<td>Membership expires soon alert</td>
<td>Creates an alert if the selected contact's membership will expire within 60 days</td>
</tr>
<tr>
<td>Expired membership alert</td>
<td>Creates an alert if the selected contact's membership is expired</td>
</tr>
<tr>
<td>Event reminder alert</td>
<td>Creates an alert if the selected contact is registered for an event occurring within 21 days.</td>
</tr>
<tr>
<td>Join now alert</td>
<td>Creates an alert if the selected contact is not a member, prompting them to join.</td>
</tr>
<tr>
<td>Missing primary email alert</td>
<td>Creates an alert if the selected contact has no primary email.</td>
</tr>
<tr>
<td>VIP alert</td>
<td>Intended for staff use; Creates a VIP alert if the selected contact is a committee President or Chair.</td>
</tr>
<tr>
<td>Major donor alert</td>
<td>Intended for staff use; creates an alert if the selected contact is assigned to a Moves Manager.</td>
</tr>
</tbody>
</table>
Let’s make an alert!

Personal outstanding balance

Hey Brian! You have an outstanding balance of $4,955.75 against 19 invoices. Please pay them to help us keep the lights on!

Join now and start enjoying members-only resources, events, and learning opportunities!

Announcements

How to Make Sure Your Business Strategy Drives Your Technology Investments
Posted on 6/5/2015
With real-world case studies, priceless self-assessment tools, and keen insights, this book will help not-for-profits avoid common but devastating mistakes and ensure their business/fundraising strategies align with their technology investments to he

View all

Recent activity

Do you know a great speaker?
By Mr. Liam D. Johnson on August 5, 2016
Announcements Discussion
We strive to have fun, informative chapter meetings and would really appreciate your help to locate speakers for our meetings. Please join the blog in our chapter community and participate in the discussion. Thank you!
Lab

Creating an alert
Creating an alert
Let’s get started!

Staff site > RiSE > Process Automation
Give your alert a name and description

<table>
<thead>
<tr>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Personal outstanding balance</strong></td>
</tr>
</tbody>
</table>

- **Enabled**
- **Name**: Personal outstanding balance
- **Description**: Prompts the logged-on individual that he/she has an outstanding A/R balance.
Select the type of task
(hint: This is an Alert)

Add a data source - Link to an existing query or build a new one
To display alerts to/for specific users you need to include a filter in your IQA query using the NetContact.ContactKey field and the @SelectedUser value.

Creating an alert
Filter your query

<table>
<thead>
<tr>
<th>Property</th>
<th>Function</th>
<th>Comparison</th>
<th>Multiple</th>
<th>Value</th>
<th>Prompt</th>
<th>@SelectedUser</th>
</tr>
</thead>
<tbody>
<tr>
<td>C$invoice.Balance</td>
<td>None</td>
<td>Greater</td>
<td>0</td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>NetContact.Contact Key</td>
<td>None</td>
<td>Equal</td>
<td>@SelectedUser</td>
<td>No</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Query Options**
- Require user to provide at least one valid value
- Limit the number of results returned

**Query Display Columns**
- Only display unique results

**Selected**
- C$invoice.Balance: Function - None; Alias - ; Link -
- C$invoice.Invoice Num: Function - Sum; Alias - ; Link -
A condition tells the alert to run only when the data source returns results. Assuming you have only one data source, your condition will likely be the same IQA query as your data source.
Creating an alert

Alert text

• Next, on the Alerts tab...
  – A data source is **necessary** if you want to merge in IMIS data in your alert message
  – An Alert Set is **necessary** if you want to use the Alert Display iPart
    • Select from a drop down, can select more than one &/or add a new one on the fly

• Create your Alert message

Alert Message

You have an outstanding account balance of (#Outstanding_Balance.BALANCE format="C") against (#Outstanding_Balance.INVOICE_NUM) invoices. To see details [Click here].

• Formatting
  – format="C" - Currency: Convert 123.456 to $123.46 ("C", en-US)
  – format="d" - Short date: Convert 6/15/2009 1:45:30 PM to 6/15/2009 (en-US)
Ability to provide different text when Staff or members are viewing others ‘on behalf of’ versus if a member is viewing their own record... personalization!

New "Personalized" Tab appears!
Creating an alert

Alert icons

In your alert message text:

• To use some of the standard Alert icons found in iMIS, click the Image Manager button on the HTML editor bar and navigate to Icons > Alerts.

• Or use your own!
Creating an alert

Enable it

To see your awesome alert, don’t forget to enable it!
To display an alert on a web page, add the Alert Display iPart to the page in RiSE >> Page Builder >> Manage Content.
Creating an alert
Alert sets

Group alerts on a page with Alert Sets
- Event pages
- Account pages
- Dashboards
- and more!

Alert set

Available
- Member alerts
- Quick Start Member alerts

Selected
- Staff account page alerts

 Hide when there are no alerts

No alerts message
Success!!

Hey Brian! You have an outstanding balance of $4,955.75 against 19 invoices. Please pay them to help us keep the lights on!

Join now and start enjoying members-only resources, events, and learning opportunities!

Announcements

How to Make Sure Your Business Strategy Drives Your Technology Investments
Posted on 8/5/2015

With real-world case studies, priceless self-assessment tools, and keen insights, this book will help not-for-profits avoid common but devastating mistakes and ensure their business/fundraising strategies align with their technology investments to he

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Scoring category alert/personalized content
1. To encourage engagement, display the user’s category with an icon and their engagement percentile
2. Create query to display percentile and category
3. Create your alert
Scoring Category Alert
Create the Data Source
Scoring Category Alert
Create the Alert

Customer engagement - Leaders

- **Enabled**
- **Name**
  - Customer engagement - Leaders
- **Description**
  - Display the customer's engagement percentile and category
- **Type**
  - Alert display
- **Data sources**
  - EngagementCategory
- **Add to alert set**
  - Member alerts
  - Staff account page alerts
- **Alert Message**

Engagement percentile: [#EngagementCategory.Percentile]
That makes you a Gold member! [Volunteer today](#) and use your iMIS Superpowers to help others!
Hey Brian! You have an outstanding balance of $1,486.90 against 4 invoices. Please pay them to help us keep the lights on!

Engagement percentile: 99
That makes you a Gold member! Volunteer today and use your iMIS Superpowers to help others!

Join now and start enjoying members-only resources, events, and learning opportunities!

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View all
Engagement badges

Sigma Chi Fraternity
Friendship, Justice and Learning since 1855

My Badges
Badges are a fun way to show your engagement with the Fraternity. They show others what you are doing or have done as a member of Sigma Chi.

- Horizons Graduate
- Balfour LTW Participant
- Balfour LTW Faculty

*Thanks to James Jones-Sigma Chi @thejamesjones
What else can we do with this?

Your turn...

- Promote products based on previous purchases
- Combine with engagement scoring to display achievement badges
- Guide a new member through their journey
  - Thanks for joining, now fill out your profile
  - Your profile is looking good, what are you interested in?
  - You’re interested in accounting? Can we interest you in a webinar?
  - You’ve viewed 5 webinars, maybe you should enroll in our certification program or attend our annual conference
  - Next week we have some volunteer opportunities (based on interests)
- What else?
- Just be careful not to be creepy
Process Automation

Tasks
Within iMIS, a task is a defined, repeatable process, whose steps can be automated.

Process Automation supports 3 different types of actions
- Send Communication
- Run a report
- Run a stored procedure
- Calculate engagement scores

Typically, a task involves emailing some form of communication to members.

Examples include:
- Confirmations or additional order information
- Reminders
- Renewal notices
- Reminders of outstanding balance
- Donation thank you
Lab

Schedule an event reminder
Creating a task
Let’s get started!

Staff site > RiSE > Process Automation
Creating a task
Let’s get started!

- Give your Task a name and a description
- In the select box, choose “Scheduled Task” from the drop-down list

Events - 3 Day event Reminder

- Name: Events - 3 Day event Reminder
- Description: Sends a event reminder to all registrants 3 days prior to the event.

Type: Scheduled task

Run task now
On the “Triggers” tab
  – Set the trigger frequency/schedule
    • Can be scheduled or based on database changes
Creating a task
Let’s get started!

- On the “Data sources” tab add a source (aka IQA query)
“Conditions” tab

- Adding a data source as a condition will restrict the task to run only if the data source returns results.
- The task will run if any of the data sources returns results, or if there are no conditions.
- Conditions can be used to further narrow down results.

You can add a data source as a condition to restrict the task to run only if the data source returns results. The task will run if any of the data sources returns results, or if there are no conditions.

Data Source | Type
--- | ---
There are no data sources.
Creating a task
Let’s get started!

“Actions” tab
• What will your task do?

Current actions you can choose from:
• Send a communication
• Run a report
• Run a stored procedure
• Calculate engagement scores
Creating a task
Let’s get started!

“Actions” tab
• Let’s send a communication
Dear Patrice,
This is a reminder that you are registered to attend our Annual Conference on Tuesday, August 29, 2017. [Visit our Event Website for more information](#)!
All materials presented during the event will be available immediately afterward on our website. We look forward to seeing you there!

Connect with us:
iMIS Communications

Benefits

• Communicate directly from iMIS
  – HTML Templates
  – Send from the account page
  – Send from query results
  – Message types give users control over which messages to receive

• Merge iMIS data in your communications
  – Event confirmations
  – Thank you emails
  – Guide your members/donors on their journey
  – SSRS Reports

• Advanced email marketing
  – Improved deliverability
  – Email statistics
    • Delivery rate
    • Opens
    • Link clicks
    • Overall and specific mailings
Marketing > Communication templates

- Several sample templates that you can use as examples
- Tip!! Copy the templates into a different folder before you modify them.
This?

<table>
<thead>
<tr>
<th>From</th>
<th><a href="mailto:jspring@advsol.com">jspring@advsol.com</a>;</th>
</tr>
</thead>
<tbody>
<tr>
<td>To</td>
<td>Mr. John Tan <a href="mailto:JohnTan@imisdemo.com">JohnTan@imisdemo.com</a>;</td>
</tr>
<tr>
<td>Subject</td>
<td>NiUG AP</td>
</tr>
</tbody>
</table>

Dear John,

Can't wait to see you in Sydney!
iMIS Communications

How to use

Or this?

From: jspring@advsol.com;
To: Mr. John Tan <JohnTan@imisdemo.com>;
Subject: NIUG AP

Dear John,
Can’t wait to see you in Sydney!

Connect with us: [social media icons]
This email was sent to JohnTan@imisdemo.com.
[INSERT LINK TO COMMUNICATION PREFERENCES HERE]
Advanced Solutions International is located at 901 N Pitt St, Alexandria, VA 22314.
Tip!! Copy the Default template into the Templates folder, then make it beautiful.
iMIS Communications
Sending email from Query Menu

New communication – Compose communication

To: (#party.Email):

Subject: 

Type: (None)

Choose Recipients  Additional Data Sources

Dear (#party.FirstName),
iMIS Communications
Query Menu iPart Configuration

- Limit users who can view data for other contacts
- Open link in a pop-up
- Show initial results for queries with optional filters
- Enable export of query results
- Enable email merge from query results
- Map query results if address is available
- Reload list from database when page refreshes

**Source query or folder**

![Select button](select)

**Menu label**

Select a query

**Results to display per page**

25

**Results display style**

Advanced
iMIS Communications

Message options

• Full HTML Editor
• Insert merge fields from datasource
  – Default party fields: {#party.fieldname}
  – Additional Datasources: {#Datasource.Fieldname}
  – Inserting repeating data {foreach}
• Insert Link
  – Communications Preferences Link
  – Content or URL
• Attachments
  – SSRS can attach the same report to everyone or, to send personalized reports to each recipient, include PartyId or ContactId as a parameter in your report.
• Choose Recipients
• Preview

http://help.imis.com/q42015_Interim_Update/Features/Marketing/Communications/Working_with_communication_templates.htm
• Inserting repeating data with `{foreach}`
  – Recipient query must include a **display** column that matches a **filter** common in the additional data source query

```
{foreach item in ProgramItems}
  {#item.Program_Item}
{/foreach}
```

Let’s look at a simple example...

Event Reminder

Let’s look at a more complex example...

Event Confirmation

http://help.imis.com/q42015_Interim_Update/Features/Marketing/Communications/Working_with_communication_templates.htm
iMIS Communications

Event Confirmation

Communication templates

Event Confirmation - Compose communication

From: jparker@imisdemo.com;
To: (#party.Email);
Cc: (#Parent.Parent_Email);
Bcc: (#registrant.Contact_email);
Subject: Registration confirmation: (#registrant.Event_Name);
Type: (None)

Choose Recipients  Additional Data Sources

Registration Confirmation

(#registrant.Event_Name)
(#registrant.BeginDate format="D")
(#registrant.Address1 noencode) (#registrant.City) (#registrant.StateProvince)

(#party.Name)
(#party.FullAddress noencode)
(#party.Email)
(foreach p in Parent) Guest of: (#p.Parent_Name)
(/foreach)
Thank you for your registration! Please verify your contact information and reply with any necessary changes. You may review your registration and event information at any time on our website:
(#registrant.Event_Name)
• Opt in or out of specific types of emails
  – Can be defined by your organization
• Compliant with anti-SPAM legislation
1. Account page Preferences or Communication Preferences link from email
2. Define your preferences
In a message, select the Type for this message to filter out people who have opted out.
Advanced email dashboard

Results are of advanced email communications sent in the past 12 months, unless otherwise indicated.

- **Emails sent**: 4,977 in the past 12 months
- **Delivered**: 58% of sent
- **Open rate**: 72% of delivered
- **Click rate**: 49% of opened

Responses in the past 90 days

By type

Delivered by month
Advanced Email marketing

Dashboards

• Improved deliverability
• Email statistics
  – Bounces
  – Delivered
  – Opens
  – Clicks
• Overall or for specific mailings
Advanced Email marketing

Advantages

Advanced email dashboard

Results are of advanced email communications sent in the past 12 months, unless otherwise indicated.

Emails sent
4,977
past 12 months

Delivered
58%
of sent

Open rate
72%
of delivered

Click rate
49%
of opened

Responses in the past 90 days

Last response per recipient

Click  Open  Spam Report

Bounce  Click  Deferred
Delivered  Dropped  Open
Spam Report  Unsubscribe
Resources

• Help & Documentation
  – help.imis.com
  – Search for Process Automation, Communications, Alerts, tasks

• Webcasts
  – Email Marketing – http://www.imis.com/emailwebcast
WITH THANKS TO OUR SPONSORS
NIUG DISCOVERY CONFERENCE