

Introduction to iMIS Email

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iMIS Communication Creator

iMIS Communication Creator allows you to:

- Design and send email communications
- Create a query to generate a list of members to email
- Tailor an email message
- Add attachments
- Send scheduled communications

Standard out-of-the-box iMIS comes with many communication templates which you can copy and edit

iMIS Communication Creator

iMIS Communication Creator is native to iMIS, which allows you to focus on building engagement with your members/donors/prospects:

- A member purchases an item from your store or registers for an event; the Order Confirmation is sent immediately (a pdf link can be included in the follow-up email if so desired)
- A donor updates their address; an automated thank you email goes out.
- Birthday wishes are sent by automated email
- Renewal notices are automatically sent out – with a link to pay online

iMIS Communication Creator

iMIS Communication Creator allows you to:

- Compose an email template
- Choose email recipients by selecting an iQA query
- Add query data sources to an email template allowing you to insert merge fields from additional data sources
- Send an email directly to recipients
- Track all emails in the Communications Log
- Tag each individual record in the Interactions log
- With 20.2.64 or greater – resend emails easily

iMIS Communication Creator

Built-in / native to iMIS

- Default email templates
- Default email queries
- Default order confirmation (note as of 20.2.64 – there are now 2 order confirmation templates)
- Communication logs track all emails
- Adds an interaction to every record (staff site)

Recent Interactions			
Date	Type	Subject	Owner
3/30/2015 11:44:56 AM	Email	Reminder	MANAGER
3/3/2015 4:29:58 PM	Email	Please renew your membership	MANAGER
2/26/2015 9:46:29 AM	Email	Donation Receipt	Mr. Brian Murphy

Communication Templates

- Default / out-of-the-box email templates
- Copy the default communication templates and change them as you wish
- Create a new default template (copy the existing default template)
- Copy the sample/default Order Confirmation; then make it your own

Communication Templates, Cond.

- Add additional data sources
 - List of orders, continuing education units, training history, certification activity, event registrations, etc.
 - Format the additional information as you wish
- Schedule emails / communications using Process Automation
 - Verify with a member that they did change their address
 - Thank a member for paying their dues
 - Notify registrants of changes to an event
 - And many more examples....

iMIS Communication Creator

Advanced Email Marketing (Plus option – additional license)

- Allows you to track the effectiveness of individual emailed communications, and apply what you learn to improve your communication approach
- Data collected from Advanced Email Marketing interactions is displayed in several dashboards on the staff site.



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Demonstration using 20.2.64

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Questions?

Thank you!

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