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<td>50</td>
</tr>
</tbody>
</table>
Key Benefits

iMIS 20 is an Engagement Management System (EMS)™ that enables your organization to engage members, donors, and other constituents — as well as your staff — anytime, anywhere, on any device.

Designed to Engage ... Anytime, Anywhere, Any Device

Built from the ground up with Responsive Design, iMIS 20 is accessible on any device. This saves your organization money because you don't have to buy specialty mobile apps.

One System ... One Database

iMIS 20 includes everything you need to engage your constituents in one seamless cloud-based system. This eliminates silos of data and greatly reduces vendors, costs, and complexity.

Unlimited Flexibility ...

Unlimited Possibilities

iMIS 20 is built on the RiSE Development Platform, a revolutionary one-of-a-kind tool that empowers you to easily and affordably meet the ever-changing online and mobile demands of your constituents.

Manage Your Website ... Or Keep Your Existing CMS

The RiSE Development Platform has the flexibility to work with your existing Content Management System (CMS) or — for many organizations — the power to manage your entire web presence.

Save Money ... Improve Performance

iMIS 20 records all interactions with your members, donors, and other constituents — whether offline or online — in a single engagement database. This eliminates costly integration efforts, enables you to gather better constituent intelligence, and helps you make smarter business decisions.
Technology

Scalability and Reliability

Built on top of the proven Microsoft SQL Server and Internet Information Services (IIS) platforms, iMIS is fully capable of the full scalability features that they provide. iMIS has no built-in limits or constraints that prevent taking full advantage of scaling up numbers of users as SQL Server and IIS natively provide for through data clustering and load balancing.

As a native Microsoft product, iMIS also offers tight integration with Microsoft Office applications including Microsoft Outlook and provides for easy data analysis through Microsoft SQL Server Reporting Services (SSRS). Plus, ASI is a leading Microsoft Gold Certified Partner which means we receive top-line support from Microsoft in testing and providing quick and responsive support answers to our clients where issues may be related to the Microsoft operating system, database or office applications.

Data Security and PCI Compliance

iMIS integrates seamlessly into any IT configuration which institutes commonly accepted security best practices, including the use of encrypted network channels, VPNs, virus protection (workstation and server class), and other data protection methods.

iMIS may also be configured with the GreenSQL Unified Database Security product as a further risk mitigation strategy to provide separation of sensitive database content from publicly exposed web servers. Plus, iMIS retains an active certification as a PCI-validated product, with comprehensive documentation on how to be configured for an organization that wishes to pass formal PCI-compliance audit.

While many solutions claim they’re PCI compliant, the truth is many are not. How can you know who to trust? iMIS 20 has been validated as compliant for new deployments with the PCI Council’s Payment Application Data Security Standard (PA-DSS) version 2.0 and in the process of becoming compliant for version 3.0. You can verify this on the PCI website at http://bit.ly/pcivalidated.
Technology Standards

iMIS adheres to many different forms of best practices and standards including:

- Agile development methodology using Scrum
- W3C Mobile web application best practices
- W3C Cascading Style Sheets (CSS) Level 2
- W3C Web Content Accessibility Guidelines (WCAG) Level 2
- Microsoft Web Communication Foundation (WCF) layer for .NET Framework 4.5
- Payment Card Industry Security Standards

Extendibility and Openness

iMIS includes a powerful set of tools for tailoring the system without affecting the product upgrade path:

- Create query building blocks that can be easily assembled by users to create complex queries
- Add an unlimited number of custom fields and tables, modify navigation and menu options, and create custom screens and web pages
- Create, modify, and extend system logic to meet unique workflow automation requirements

iMIS also includes an open web-based Application Programming Interface (API) to iMIS that can allow a wide variety of applications to communicate with iMIS, regardless of technology or application platform. Full documentation on the iMIS API is available at www.advsol.com/api.

Mobile Capability

iMIS is inherently designed to operate in a Responsive Web Design environment. Every functional element of iMIS includes options for display on multiple devices.

Plus we also provide ready-to-use Responsive Web templates that you can use for your organization’s website, members-only website, fundraising microsite, or event microsite. You can use these templates to create a mobile presence or use a third-party Web Content Management System (CMS) and still take advantage of the inherent responsiveness of iMIS.
Upgradability

iMIS is designed to be easily upgraded as we release new versions so clients can stay current with technology and take advantage of new and improved features. This means that operating costs are predictable and controllable from initial implementation through long-term use.

Nearly 1,000 of our clients who invested in iMIS more than 10 years ago continue to use iMIS and have upgraded to the latest versions. Easy, high-value upgrades are a hallmark of ASI. You might say it’s in the DNA of our company.
Cloud Delivery

iMIS Cloud services delivers iMIS via the Internet and enhances data security, improves system performance, reduces costs, and frees your IT team to focus on mission-critical projects. We offer three versions of Cloud services that can scale to meet the needs of any association of not-for-profit, no matter the size.

Premium Infrastructure
Our Tier III+ data centers in the US, Canada, UK, and Australia provide the industry’s highest level of reliability. Our data centers also comply with key standards helping your organization to stay compliant as well.

Enhanced Data Security
We provide daily and monthly backups of your data and store them in a secure off-site facility. We also use best-in-class intrusion detection and prevention systems to protect your system and data.

Virtual IT Department
Our team of certified iMIS, Microsoft, and Data Security experts has extensive experience and knowledge which is difficult and cost-prohibitive for most organizations to replicate. We make sure your iMIS system is protected, properly maintained, and always available.

Improved Performance
We offer "on-demand capacity management" to ensure that spikes in demand to your system are handled flawlessly. Plus, in the iMIS cloud, systems can be setup more quickly, upgraded faster, and expanded with new modules in less time.

World-Class Support
In addition to our state-of-the-art monitoring and best-in-class security systems we always have staff on call - 24 hours a day, 7 days a week. We monitor your system for utilization, capacity, security and web traffic to proactively identify and resolve issues.

Cost and Time Savings
In the iMIS Cloud there is no expensive, complex infrastructure to manage. Software updates can be automatic and managed by a team of iMIS experts. Plus, your IT staff is no longer burdened by infrastructure management and able to focus on mission-critical projects.

<table>
<thead>
<tr>
<th>Supported Products</th>
<th>Standard</th>
<th>Standard Plus</th>
<th>Traditional</th>
</tr>
</thead>
<tbody>
<tr>
<td>IMIS 20</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>IMIS 19'15</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>IMIS 20 Website</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Automatic IMIS Updates</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Informa</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TaskCentre</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3rd Party Web CMS</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other 3rd Party Products</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Custom iPars</td>
<td>X</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Pricing and Editions

Editions

iMIS 20 offers pricing plans that can scale to meet the needs of any association or not-for-profit, no matter the size.

<table>
<thead>
<tr>
<th>Edition</th>
<th>iMIS20-100</th>
<th>iMIS20-200</th>
<th>iMIS20-300</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STANDARD</strong></td>
<td>A packaged cloud-based solution for small-staff not-for-profits.</td>
<td>A flexible cloud-based solution for not-for-profits of any size.</td>
<td>A flexible and extendable cloud-based or on-premise solution for not-for-profits of any size.</td>
</tr>
<tr>
<td><strong>ADVANCED</strong></td>
<td>• Up to 5 Users</td>
<td>• Unlimited Users</td>
<td>• Unlimited Users</td>
</tr>
<tr>
<td><strong>EXTENDABLE</strong></td>
<td>• Up to 25,000 Contacts</td>
<td>• Unlimited Contacts</td>
<td>• Unlimited Contacts</td>
</tr>
<tr>
<td></td>
<td>• Cloud-Based</td>
<td>• Cloud-Based</td>
<td>• Cloud-Based or On-Premise</td>
</tr>
<tr>
<td></td>
<td>• Fixed-Price Implementation</td>
<td>• Customizable</td>
<td>• Customizable</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Advanced Features</td>
<td>• Advanced and Extended Features</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• CMS Integration</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Authorized Add-On Apps</td>
</tr>
</tbody>
</table>

Membership Bundle

Combines all the modules you’ll need to efficiently and effectively manage your membership fees and subscriptions with unlimited options, provide members with online and mobile access to their data, track chapters and committee activity, and offer online/mobile membership directories.

Fundraising Bundle

Combines all the modules you’ll need to increase your fundraising performance, provide convenient online donation options, offer mobile access, and build meaningful, long-lasting relationships with your donors.
# Edition Comparison

“√” included • “+” optional
“M” included in Membership Bundle
“F” included in Fundraising Bundle

<table>
<thead>
<tr>
<th>Suite – Module</th>
<th>Description</th>
<th>Standard</th>
<th>Advanced</th>
<th>Extendable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community</td>
<td>Manage your community of individuals, groups, and organizations.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Contacts</td>
<td>Manage contact, address, and demographic information.</td>
<td>√</td>
<td>√</td>
<td>√</td>
</tr>
<tr>
<td>- Address Verification</td>
<td>Automatically verify and clean address information.</td>
<td>√</td>
<td>√</td>
<td>√</td>
</tr>
<tr>
<td>- Contact Merge</td>
<td>Standard: Find, merge, and clean duplicate records.</td>
<td>√</td>
<td>√</td>
<td>√</td>
</tr>
<tr>
<td></td>
<td>Plus: Allows System Administrators to run a scheduled task that will locate all potential duplicate pairs.</td>
<td></td>
<td></td>
<td>+</td>
</tr>
<tr>
<td>- Online/Mobile Profile</td>
<td>Empower constituents to manage their own profile, membership history, giving history, and committee/chapter participation and create searchable online directories of specific groups.</td>
<td></td>
<td></td>
<td>√</td>
</tr>
<tr>
<td>- Group Administrator</td>
<td>Standard: Allow an individual to manage organization/committee rosters and edit contact information or conduct transactions for colleagues or committee members.</td>
<td></td>
<td></td>
<td>√</td>
</tr>
<tr>
<td></td>
<td>Plus: Allow an individual to manage chapter rosters and edit contact information or conduct transactions for chapter members.</td>
<td></td>
<td></td>
<td>+</td>
</tr>
<tr>
<td>- Online/Mobile Communities</td>
<td>Standard: Create and manage members-only online communities with discussion forums, document libraries, and more.</td>
<td></td>
<td></td>
<td>√</td>
</tr>
<tr>
<td></td>
<td>Plus (Golightly): A complete cloud-based, turn-key and standalone online community solution.</td>
<td></td>
<td></td>
<td>+</td>
</tr>
<tr>
<td>Suite – Module</td>
<td>Description</td>
<td>Standard</td>
<td>Advanced</td>
<td>Extendable</td>
</tr>
<tr>
<td>-------------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>----------</td>
<td>----------</td>
<td>------------</td>
</tr>
<tr>
<td><strong>Membership</strong></td>
<td>Manage chapters/committees, process membership fees, and analyze membership performance.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- <strong>Billing</strong></td>
<td>Manage membership dues/fees and subscriptions with unlimited options for pricing, frequency, and accounting methods.</td>
<td>M</td>
<td>M</td>
<td>M</td>
</tr>
<tr>
<td>- <strong>Online/Mobile Billing</strong></td>
<td>Enable your members to join or renew their membership dues/fees online or through a mobile device.</td>
<td>M</td>
<td>M</td>
<td>M</td>
</tr>
<tr>
<td>- <strong>Chapters/Committees</strong></td>
<td>Track and manage current and historical chapter/committee membership and activity.</td>
<td></td>
<td></td>
<td>M</td>
</tr>
<tr>
<td><strong>Fundraising</strong></td>
<td>Manage fundraising activity, process gifts/pledges, and analyze fundraising performance.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- <strong>Gift Processing (Fundraising)</strong></td>
<td>Process pledges/gifts of all types including annual, major, recurring, planned, and tribute.</td>
<td>F</td>
<td>F</td>
<td>F</td>
</tr>
<tr>
<td>- <strong>Online/Mobile Donations</strong></td>
<td>Enable your donors to give online or through a mobile device.</td>
<td>F</td>
<td>F</td>
<td>F</td>
</tr>
<tr>
<td>- <strong>Moves Management (Included with Gift Processing)</strong></td>
<td>Manage the highly individual and hands-on approach necessary to cultivate major gifts.</td>
<td>F</td>
<td>F</td>
<td></td>
</tr>
<tr>
<td>- <strong>Crowdfunding (Cause2Give)</strong></td>
<td>Turn your donors into fundraisers with online peer-to-peer fundraising.</td>
<td></td>
<td></td>
<td>+</td>
</tr>
<tr>
<td><strong>Events</strong></td>
<td>Manage conferences, meetings, and training classes of all sizes.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- <strong>Events Management</strong></td>
<td>Manage the planning, logistics, communication, and registration for events of all types and sizes.</td>
<td>√</td>
<td>√</td>
<td>√</td>
</tr>
<tr>
<td>- <strong>Online/Mobile Events</strong></td>
<td>Enable your constituents to register for events and access event details including locations, agendas, speakers, registration lists, and more.</td>
<td>√</td>
<td>√</td>
<td>√</td>
</tr>
<tr>
<td><strong>Certification</strong></td>
<td>Manage your organizations professional education programs.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- <strong>Certification</strong></td>
<td>Create and manage multiple certification programs and allow applicants to apply online and track their progress.</td>
<td></td>
<td></td>
<td>+</td>
</tr>
<tr>
<td>- <strong>CEU</strong></td>
<td>Define and award Continuing Education Units (CEU) based on event attendance.</td>
<td></td>
<td></td>
<td>M</td>
</tr>
<tr>
<td>Suite – Module</td>
<td>Description</td>
<td>Standard</td>
<td>Advanced</td>
<td>Extendable</td>
</tr>
<tr>
<td>-------------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>----------</td>
<td>----------</td>
<td>------------</td>
</tr>
<tr>
<td><strong>Marketing</strong></td>
<td>Manage list acquisition/definition, campaign tracking, and sales activity.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- <em>Email Marketing</em></td>
<td>Standard: Send email communications to individuals or groups.</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Plus: Design, send, and track targeted email marketing campaigns.</td>
<td></td>
<td></td>
<td>+</td>
</tr>
<tr>
<td>- <em>Acquisitions</em></td>
<td>Import and integrate contact lists for recruiting new constituents while keeping your database clean of unwanted records.</td>
<td></td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>- <em>Segmentation</em></td>
<td>Segmentation assists with targeting the market or the segment of the database that is most likely to respond to the marketing effort.</td>
<td></td>
<td>+</td>
<td></td>
</tr>
<tr>
<td>- <em>Campaigns</em></td>
<td>Offers all of the key performance tracking to see up-to-date and accurate results of all of your marketing efforts, and ongoing campaign analysis.</td>
<td></td>
<td>+</td>
<td></td>
</tr>
<tr>
<td>- <em>Process Manager</em></td>
<td>Define and manage the workflow for sponsorships, memberships, major giving, and other large sales opportunities or complex processes.</td>
<td></td>
<td>+</td>
<td></td>
</tr>
<tr>
<td><strong>Commerce</strong></td>
<td>Manage financial transactions of all types and integrate to the General Ledger (G/L) package of your choice.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- <em>Accounts Receivable</em></td>
<td>Manage invoicing, cash receipts and other financial transactions.</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>Deferred Income — Delay recognition of income to coincide with when income is earned matching when related expenses are incurred.</td>
<td></td>
<td></td>
<td>+</td>
</tr>
<tr>
<td></td>
<td>Refunds (AP Interface) — Any AR item with a credit balance can be processed as a refund.</td>
<td></td>
<td></td>
<td>+</td>
</tr>
<tr>
<td></td>
<td>G/L Interface — Integrate to the General Ledger (G/L) package of your choice.</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- <em>AutoPay</em></td>
<td>Automate recurring (i.e. weekly, monthly, yearly) membership fees and donations.</td>
<td>✓</td>
<td>+</td>
<td></td>
</tr>
<tr>
<td>- <em>Orders</em></td>
<td>Manage products/product kits and process product orders.</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>- <em>Inventory</em></td>
<td>Manage inventory across multiple locations, manage back orders, and create relationships between products for cross-selling, up-selling, and suggesting replacements.</td>
<td></td>
<td></td>
<td>+</td>
</tr>
</tbody>
</table>
## Suite – Module

<table>
<thead>
<tr>
<th>Description</th>
<th>Standard</th>
<th>Advanced</th>
<th>Extendable</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Online/Mobile Store</strong></td>
<td>Enable your constituents to buy products and access their order history online.</td>
<td>✓ ✓ ✓</td>
<td></td>
</tr>
<tr>
<td><strong>Advertising (Spacemaster)</strong></td>
<td>Manage advertising opportunities from sales through insertion.</td>
<td>+</td>
<td></td>
</tr>
</tbody>
</table>

### Continuum — Business Intelligence

<table>
<thead>
<tr>
<th>Description</th>
<th>Standard</th>
<th>Advanced</th>
<th>Extendable</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Reports</strong></td>
<td>Create, deploy, and manage reports for your organization with Microsoft SQL Server Reporting Services (SSRS).</td>
<td>✓ ✓ ✓</td>
<td></td>
</tr>
<tr>
<td><strong>Dashboards</strong></td>
<td>Achieve continuous performance improvement through real-time measurement of key operational metrics.</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td><strong>RFM Analysis</strong></td>
<td>Rank and organize your contacts and prospects into specific groups according to the relative recency, frequency, and monetary value (RFM) scores of their transactions.</td>
<td>+</td>
<td></td>
</tr>
<tr>
<td><strong>Analytics</strong></td>
<td>Store and protect your data in a data warehouse, drill down to unearth trends and patterns, and analyze organizational performance over time.</td>
<td>+</td>
<td></td>
</tr>
</tbody>
</table>

### RiSE — Web Development Platform

<table>
<thead>
<tr>
<th>Description</th>
<th>Standard</th>
<th>Advanced</th>
<th>Extendable</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Page Builder</strong></td>
<td>Quickly and easily build web pages.</td>
<td>✓ ✓ ✓</td>
<td></td>
</tr>
<tr>
<td><strong>Site Builder</strong></td>
<td>Standard: Manage navigation and content across a single website.</td>
<td>✓ ✓ ✓</td>
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<tr>
<td></td>
<td>Plus: Manage navigation and content across multiple websites.</td>
<td>✓ ✓</td>
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<tr>
<td><strong>Query Builder (IQA)</strong></td>
<td>Easily create complex queries and export the results into a variety of file formats.</td>
<td>✓ ✓ ✓</td>
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<tr>
<td><strong>Process Automation</strong></td>
<td>Standard: Use pre-built tasks and alerts to automate manual processes.</td>
<td>✓ ✓</td>
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<tr>
<td></td>
<td>Plus: Create your own unique tasks and alerts to automate manual processes.</td>
<td>+ +</td>
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<tr>
<td><strong>Translator</strong></td>
<td>Standard: Translate fields, menus, screens, and web pages to one additional language.</td>
<td>✓ ✓ ✓</td>
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<tr>
<td></td>
<td>Plus: Translate fields, menus, screens, and web pages to multiple languages.</td>
<td>+ +</td>
<td></td>
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<tr>
<td><strong>Data Imports/Exports</strong></td>
<td>Easily import and export data, including financial transactions, in a variety of formats.</td>
<td>✓ ✓ ✓</td>
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<tr>
<td><strong>API</strong></td>
<td>Easily integrate to external applications.</td>
<td>✓ ✓</td>
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Modules
Community

Go beyond typical constituent management with iMIS 20. With simple-to-use tools, your constituents are empowered to update their own profile information and manage their committee, chapter, and online community memberships.

But, your organization maintains control over which data constituents can access/modify – either by individual or organization – including profile/stats, address, demographic, and transactional information. This means added convenience for constituents and increased productivity for you.

Key Modules:

- **Contacts**: Manage contact, address, and demographic information.
- **Contact Merge**: Find, merge, and clean duplicate records.
- **Address Verification**: Automatically verify and clean address information.
- **Online/Mobile Profile**: Empower constituents to manage their own profile, membership history, giving history, and committee/chapter participation online or through a mobile device and create searchable online directories of specific groups.
- **Group Administrator**: Allow an individual to manage organization/committee rosters and edit contact information or conduct transactions for colleagues or committee members.
- **Online/Mobile Communities**: Create and manage members-only online groups with discussion forums, blogs, and document libraries online or through a mobile device.
Contacts

Manage contact, address, and demographic information for contacts, organizations, or groups.

Key Features:

✓ Manage contact, address, and custom demographic information for individuals or organizations.
✓ Create an unlimited number of tables and fields for collecting and tracking custom demographic data.
✓ Define multiple addresses to be maintained for each contact.
✓ Maintain separate phone, fax, and email addresses for multiple addresses.
✓ Track and manage contact activity including email correspondence, phone calls, meetings, event attendance, product sales, membership fees, or donations.
✓ Create an unlimited number of custom activities.
✓ Store social media addresses for individuals and organizations.
✓ Relate individuals and subsidiaries to a parent organization for hierarchical rosters.
✓ Easily search and find contacts using any data field.
✓ Relationships (iMIS 20-300 only): Create unique reciprocal relationships between individuals or organizations.

Address Verification

iMIS 20 includes postal mail address validation provided by Experian Data Quality: www.edq.com.

Key Features:

✓ Corrects missing or inaccurate data elements.
✓ Ensures consistent formatting of addresses and corrects typos.
✓ Validates both U.S. and international addresses.
✓ Cleans your lists as you need them, without interrupting your existing collection process.

Contact Merge

Contact Merge enables you to identify potential duplicate contacts or organizations and merge duplicate records. All financial, activity, and other information associated with the duplicate record is transferred to the correct record. Missing information on the correct record can be populated by information from the duplicate record.
Online/Mobile Profile

Go beyond typical constituent management with iMIS 20. With simple-to-use tools, your constituents are empowered to update their own profile information online or through a mobile device and access their financial history.

Key Features:

- Use standard Profile web page or easily change page design with drag and drop simplicity.
- Determine which fields constituents can view and edit.
- Enable constituents to view their event, order, membership, or giving history.
- Enable constituents to view their committee, chapter, or community participation.
- Create searchable online directories of specific groups.

Group Administrator

iMIS 20 includes three types of Group Administrators roles: Company, Committee, and Chapter. These are roles that can be assigned to your members, donors, or other constituents to perform certain actions online.

Company Administrators can manage other contacts linked to their organization's record. They can add, edit, and remove other contacts as well as register them for events or pay membership fees on their behalf. Committee Administrators can add contacts to, or remove contacts from, a committee roster. A Chapter Administrator can manage contacts in a Chapter. They can edit other contacts as well as register them for events or pay membership fees on their behalf.
Online/Mobile Communities

Savvy not-for-profits understand it takes a lot more than a Facebook page and Twitterfeed to create an effective social experience for members, donors, and other constituents. Online communities — where constituents can connect, collaborate, and communicate in a secure, trusted setting — have emerged as one of the smartest ways to demonstrate value and ensure retention rates.

With iMIS 20, your organization can provide a highly popular resource to constituents while also guiding/monitoring discussions in a controlled environment, protecting your proprietary assets, and accurately measuring the impact of your engagement efforts.

Key Standard Features:

- **Discussion Forums**: Provide an online forum for your community members to ask questions, offer answers, and discuss issues. Moderate posts and provide community members multiple options for receiving from updates from individual posts to weekly digests.
- **Groups**: Create multiple communities — each with their own security settings, discussion forums, document libraries, wikis, and/or blogs. Easily define who can see and join individual communities based on any criteria.
- **Discussion Forums**: Provide an online forum for your community members to ask questions, offer answers, and discuss issues. Moderate posts and provide community members multiple options for receiving from updates from individual posts to weekly digests.
- **Document Libraries**: Collaborate with your community members to build a knowledge base. Create a library of documents, video, audio, and image files accessible to your community members and empower your community members to share files to the document library.
- **Wikis**: Empower your community members to collaboratively author content such as a glossary of industry terms.
- **Flexibility**: Communities can combine all features or just one, such as a Discussion Forum.

Advanced Communities (Golightly)

Golightly is a cloud-based, turn-key and standalone online community solution integrated to iMIS.

The solution features the latest online networking and communication tools, such as Blogs, Shared Libraries, Profiles, Forums, Tagging and Tag clouds, Groups, and Listservs.
Membership

iMIS 20 takes traditional membership management to the next level by providing your members with online and mobile access to your organization – so they can tap into your tools and resources, renew their memberships, make donations, and even register themselves for your events anytime, anywhere.

You can collect membership fees, manage chapters, track committee participation, as well as analyze membership performance to maximize revenue.

Your Members Can:

- Join your organization or renew membership fees online or through a mobile device.
- Manage their own profile, membership history, and committee/chapter participation online or through a mobile device.
- Register for an event, donate money, or buy products when renewing membership fees – all from a single cart.

Your Organization Can:

- Easily customize online or mobile join/renew pages with no programming necessary.
- Leverage unlimited options for pricing, frequency, and accounting methods for membership fees.
- Manage chapters, divisions, affiliates, or branches of a parent organization.
- Manage member participation in committees, boards, and task groups.
- Track and measure new member acquisition, member retention, and overall membership performance.
Key Modules:

✓ **Membership Fees/Dues Billing:** Manage membership fees with unlimited options for pricing, frequency, and accounting methods.
✓ **Online/Mobile Membership Fees:** Allow your members to join or renew their membership fees online or through a mobile device.
✓ **Chapters and Committees:** Track and manage current and historical chapter and committee membership and activity.

**Billing**

Streamline the process of collecting membership fees, dues, and subscriptions.

✓ Provides three comprehensive billing platforms: product codes, member types, and special pricing.
✓ Allows simple or special pro-rationing and unlimited customization of pricing for billing through special pricing.
✓ Establish billing time as anniversary, annual, or both and the accounting method as cash-based, accrual-based, or both.
✓ Create unlimited billing cycles for unique or customized billing.
✓ Email reminders and invoices on an ad hoc or automated basis with iMIS Process Automation and eMail Marketing.
✓ Automate recurring membership fees with iMIS AutoPay.
✓ Produce all necessary billing documentation, including dues notices invoices and reminders, transaction lists, and trial balances.

**Online/Mobile Billing**

Allow your members to join or renew their membership dues/fees online or through a mobile device.

✓ Use standard Join Now web page or easily change page design with drag and drop simplicity.
✓ Accept Credit/Debit Card, Direct Debit/ACH/EFT, and PayPal for membership fees.
✓ Display multiple member types/fees and allow members to self-select a chapter when joining.
✓ Enable members to register for events, buy products, or donate to your organization when joining or renewing their membership.
✓ Let members manage their own profile information and access their purchase history.
✓ Empower members to share their support for your organization on popular social media sites like Facebook, Twitter, and LinkedIn
Chapters and Committees

Streamline the management of chapters and committees.

- Create and manage unlimited chapters.
- Allow members to self-select a chapter when joining your organization.
- Chapter membership is recorded and visible on the contact’s record.
- Easily select a chapter directory to email, export and/or display online.
- Designate a member as a Chapter Administrator and allow them to edit other chapter member’s records as well as register them for events or pay membership fees on their behalf.
- Create and manage unlimited committees.
- Select a role and begin/end date when adding committee members.
- Committee membership is recorded and visible on the contact’s record.
- Easily select a committee list to email, export and/or display online.
- Designate a member as a Committee Administrator and allow them to add contacts to, or remove contacts from, a committee roster.
Fundraising

iMIS 20 takes donor management to new heights by providing the tools you need to inspire, acquire, retain, and develop a more meaningful relationship with your donors.

With both online and mobile access to your organization, your donors can tap into your resources, share insights with others who are also committed to your cause, update their own data, purchase products, and register for your events. They can even become fundraisers themselves with peer-to-peer tools that expand your organization’s visibility and reach. Your organization can plan, execute and measure your fundraising campaigns to maximize revenue.

Your supporters can:

- Donate to your organization online or through a mobile device.
- Manage their own profile information and view giving history online or through a mobile device.
- Share their support for your organization on popular social media sites like Facebook, Twitter, and LinkedIn.
- Raise money for events or special occasions through their own fundraising web page.

Your organization can:

- Process pledges/gifts of all types including annual, major, recurring, planned, and tribute.
- Enter multiple gifts at one time through the Rapid Gift Entry feature.
- Automate pledge reminders, gift acknowledgements, and donation receipts.
- Solicit donations when supporters register for events, buy products, or renew memberships online or through a mobile device.
- Easily customize online/mobile giving web pages with no programming necessary.
- Manage recurring payments through the AutoPay feature.
- Manage the highly individual and hands-on approach necessary to cultivate major gifts.
- Track and measure appeal, campaign, or fund performance.
Key Modules:

- **Gift Processing**: Streamline the processing and acknowledgment of pledges/gifts of all types including annual, major, recurring, planned, and tribute.
- **Online/Mobile Donations**: Enable your donors to give online or through a mobile device.
- **Moves Management** (Included with Gift Processing): Manage the highly individual and hands-on approach necessary to cultivate major gifts.
- **Crowdfunding**: Turn your donors into fundraisers with online peer-to-peer fundraising.

**Gift Processing**

Streamline the processing and acknowledgement of pledges/gifts of all types including annual, major, recurring, planned, and tribute.

- Enter multiple gifts at one time through the Rapid Gift Entry feature.
- Manage recurring payments through the AutoPay feature.
- Record and apply matching gifts.
- Attach back-end premiums and manage premium inventory.
- Automate pledge reminders, gift acknowledgements, and donation receipts.
- Record all gifts and pledges with the appropriate revenue distribution.
- Apply a single contribution to more than one campaign, fund, or appeal.
- Track and measure appeal, campaign, or fund performance.

**Online/Mobile Donations**

Allow supporters to donate to your organization online or through a mobile device.

- Use standard Give Now web page or easily change page design with drag and drop simplicity.
- Accept Credit/Debit Card, Direct Debit/ACH/EFT, and PayPal for donations.
- Display an array of gift amount options, select an amount to be pre-selected, and allow supporters to enter a custom amount.
- Allow supporters to designate a donation as a tribute, in another person's name, or as an anonymous gift.
- Enable supporters to register for events, pay membership fees, or buy products when donating to your organization.
- Let supporters manage their own profile information and access their giving history.
- Empower supporters to share their support for your organization on popular social media sites like Facebook, Twitter, and LinkedIn.
Moves Management

With iMIS 20 you can manage the highly individual and hands-on approach necessary to cultivate major gifts. You can assign prospective donors to individual Moves Managers and manage a unique cultivation plan for each donor.

Moves Management enables you to manage a pipeline of prospective donors across a team of Moves Managers. You can track activities from prospect identification, to cultivation, to the request for funds and, finally, through the stewardship phase of the relationship.

Key Features:

- Assign prospective donors to a Moves Manager.
- Provide the Moves Manager with a unique landing page highlighting their pipeline of prospective donors and active donors.
- Track key major and planned giving metrics like the gift type, estimated value, quality of prospect and any required notes.
- Manage one-to-one relationships between donor and other constituent records.
- Track and follow up on key activities, touches and moves that are required to move a donor from no gift to their maximum and correct gift.
- Track the overall effectiveness of a Moves Manager’s portfolio.
Crowdfunding (Cause2Give)

Turn your donors into fundraisers with Cause2Give P2Pledge. With the P2Pledge peer-to-peer fundraising solution you can allow your donors, volunteers, and other supporters to create their own event microsite to support your fundraising efforts.

P2Pledge supports personal fundraising, team-based fundraising, and event fundraising such as golf tournaments, galas, and races.

Key Features:

- Create and manage your own personal or team-based fundraising web pages that are multi-currency and bilingual.
- Process event registrations and donations.
- Automated donor thank-yous and receipts.
- Allow anonymous contributions.
- Show real-time progress towards fundraising goals.
- Track total donations, top individual fundraisers, and top team fundraisers.
- Create a searchable directory of personal and team-based fundraising pages.
- Allow visitors and supporters to leave comments on personal or team-based fundraising pages.
Events

Your large and small event experience just got an upgrade. Now your members, donors, and other constituents can register for a conference/meeting/training class, access agendas and locations, read speaker bios, find out which of their peers are also attending, and more— all online or through a mobile device. This sort of control and access is what drives attendee satisfaction, increases product purchases, generates positive referrals, and ensures retention.

With iMIS 20, your organization can offer flexible event pricing according to constituent status, manage wait-lists, and more. Large or small, your events have never been more accessible, productive, or profitable.

Event Management

Streamline the management of events of all types and sizes, allow constituents to register online or through a mobile device, and offer a responsive event microsite for any event.

Key Features:

- Manage the planning, logistics, communication, and registration for events of all types and sizes.
- Add sessions, breakout groups, and social functions for larger events.
- Offer flexible pricing based on registration date, membership type, or other demographic information.
- Set a cut-off date, determine maximum registration amounts, and manage wait-lists for fully-booked event functions.
- Automate reminder and thank you event emails.
Online/Mobile Events

Allow your members, donors, and other constituents to register for events online or through a mobile device.

Key Features:

✓ Use standard Event web page or easily change page design with drag and drop simplicity.
✓ Accept Credit/Debit Card, Direct Debit/ACH/EFT, and PayPal for registration payments.
✓ Allow constituents to pay membership fees, donate money, or buy products when registering for an event.
✓ Display event details, including locations, agendas, speakers, registration lists, and more.
✓ Create a responsive event microsite for any event with agenda, registration directory, Twitterfeed, and more.
✓ Create general or event-specific promotion codes that can be applied during the checkout process.
✓ Empower supporters to promote your event on popular social media sites like Facebook, Twitter, and LinkedIn.

Event Microsite

iMIS 20 includes a responsive event microsite that can be used for any event you create in iMIS.

It can be used as both your event microsite to promote your event and capture registrations as well as your onsite mobile site with agenda, registration directory, Twitterfeed, and additional information you wish to add.
Certification

Certification

When running continuing education, certification and accreditation programs, it’s vital that you have the tools that are specifically designed to help you improve your performance and minimize risk.

With iMIS 20, you can create repeatable, scalable and integrated programs with a system that has a solid track record for stability, reliability, and predictability. You have the flexibility to manage multiple certification programs, streamline application processes, generate notifications, and track candidate progress from start to finish.

Key Features:

- Define and manage multiple certification programs, each with a different set of criteria.
- Specify any combination of requirements for a certification, including integration with iMIS events and products.
- Allow applicants to apply for certifications online.
- Allow applicants to view and monitor their certification progress online.
- Link certification program criteria to iMIS events or products.
- Keep track of which individuals are certified and identify individuals who certifications need renewal.
- Send automated emails to applicants who are approved or denied certification.
- Send automated reminders to certificants who need to renew their certifications.

Continuing Education Units (CEU)

Award continuing education credits (CEUs, CMEs, etc.) to individuals or groups based on event attendance or other criteria you define.
Marketing

With iMIS 20, you can create highly effective, targeted marketing programs that resonate with your members, donors and other constituents. Our advanced data management tools let you select and segment lists, define/manage budgets, execute multi-channel programs, assign follow-up, and analyze results.

You can also manage sponsorships, memberships, major giving, or other large sales opportunities — all from one centralized system that gives you the power, control, and flexibility you need to run today’s sophisticated integrated programs.

Key Modules:

✓ **Email Marketing**: Design, send, and track targeted email marketing communications.

✓ **Acquisitions**: Import and integrate contact lists for recruiting new constituents while keeping your database clean of unwanted records.

✓ **Segmentation**: Segmentation assists with targeting the market or the segment of the database that is most likely to respond to the marketing effort.

✓ **Campaigns**: Offers all of the key performance tracking to see up-to-date and accurate results of all of your marketing efforts, and ongoing campaign analysis.

✓ **Process Manager**: Define and manage the workflow for sponsorships, memberships, major giving, and other large sales opportunities or complex processes.
Email Marketing

Leverage state-of-the-art communication tools — directly from iMIS — that will help you engage your members, donors, and other constituents with dynamic, consistent, and relevant messaging.

With iMIS 20, you can quickly and efficiently send individual emails or campaigns and then record and track results. From deliveries to opens to unique clicks — you can access and analyze your communications to identify what works, eliminate what doesn’t, and spot emerging trends.

Key Standard Features:

- Easily create email communications and preview before sending.
- Send emails to individuals or segmented lists based on standard or user-defined queries.
- Create multiple email templates (i.e., new member, new donor, board, committee, etc.) to ensure list, messaging, and brand consistency.
- Personalize emails by merging any kind of data from iMIS (i.e., name, event registered for, dues amount invoiced, donation received, certification achieved, etc.).
- Add attachments such as PDFs and static or personalized SSRS reports to emails.
- Define multiple email types (i.e., event, training, etc.) so you can manage communication preferences and unsubscribes.
- Automatically record sent email details, including the date, sender, and content on individual contact records.
- Schedule and automate emails such as receipts, account updates, and other system emails with iMIS Process Automation.

Key Plus Features:

- Track delivery, open, and click rates for an individual email or email campaign through a real-time dashboard.
- Monitor and update undeliverable emails.
- Record email delivery, open, and click rates on individual contact records.
Acquisitions

Import contact and organization records into iMIS and store them in a prospect table separate from your main constituent database. You can include the prospect table when searching for records in your constituent database and easily convert them one by one. This enables you to maintain a database of prospects separate from your member or donor database that you can access when necessary for marketing or other activity.

Segmentation

Query contact, demographic, preference, and transaction data to develop targeted marketing lists. Define and save segments and segment data as permanent lists and assign unique source codes to segments to effectively analyze segmentation success in a specific marketing effort. Create n-Select segments for testing, split segments into multiple lists, de-dup lists created from multiple segments, and manually edit segments by removing or adding individual records. Export segments in variety of formats for external delivering mediums.

Campaigns

Define and manage a coordinated series of marketing activities. Define and manage all marketing efforts associated with a campaign. Define response and revenue goals at every level of the campaign. Define budgets and track costs at every level of a campaign. Define the list segment, multi-media delivery method, and accompanying collateral for each individual marketing effort. Build and manage unique source codes at every level of a campaign. Clone successful campaigns or purge unsuccessful ones.

Process Manager

Create, manage, and track sales opportunities of all types. Assign individuals or groups with defined ownership roles to manage opportunities. Ensure a consistent sales process is followed through the creation of pre-defined actions. Set notification options so a supervisor can be alerted when assigned actions have been completed. Forecast and analyze sales performance through a variety of standard reports.
Commerce

With iMIS 20 you can manage inventory, product sales, invoicing and other financial transactions – all from one centralized system.

Your members, donors, and other constituents can buy products, track their order status, and review their order history online or through a mobile device. Your organization can process PCI-compliant transactions, increase staff productivity, reduce costs, and improve your organization’s performance.

Key Modules:

- **Accounts Receivable (AR):** Manage invoicing, cash receipts and other financial transactions.
- **AutoPay:** Automate recurring (i.e. weekly, monthly, yearly) membership fees and donations.
- **Orders:** Manage products/product kits and process product orders.
- **Inventory:** Manage inventory across multiple locations, manage back orders, and create relationships between products for cross-selling, up-selling, and suggesting replacements.
- **Online/Mobile Store:** Enable your constituents to buy products and access their order history online.
- **Advertising (Spacemaster):** Manage advertising opportunities from sales through insertion.

*iMIS 20 has been validated as compliant with the Payment Application Data Security Standard (PA-DSS) by the PCI Security Standards Council.*
Accounts Receivable

Streamline the processing of financial transactions of all types and integrate to the General Ledger (G/L) package of your choice.

Key Standard Features:

✓ Process cash, check, and credit card receipts for sales transactions against open receivables or as a prepayment in advance of any income application.
✓ Group transactions by operation, module, or other function and assign checks and balances such as control amounts and counts to the data entry process.
✓ Use system-generated or user-defined batch numbering and finalize all batch transactions through the posting/closing process.
✓ Process transactions for two or more independent organizations and support multiple cash accounts.
✓ Accept Credit/Debit Card, Direct Debit/ACH/EFT, and PayPal payments for event registrations, product sales, membership fees, donations, product sales and more through integration to a variety of payment gateways.

Key Plus Features:

✓ **Refunds:** Any AR item with a credit balance can be processed as a refund. View, analyze, and print a list of credit items and issue refunds, either for all items or selectively for specific items.
✓ **Deferred Income:** Automatically trigger deferred income and processing for transactions from dues/subscription products, event registrations, and exposition sales. Automate the recognition of appropriate income amounts as the income is earned. Generate corresponding entries to transfer amounts from the deferred income account to the regular income account in your organization’s General Ledger solution.
✓ **G/L Interface:** Integrate to the General Ledger (G/L) package of your choice with the GL Interface Kit. Existing G/L package integrations include: ACCPAC for Windows, Fundware, Great Plains Dynamics-Integration Manager, MAS 90 (Sage), MIP NonProfit Series, Peachtree for Windows, Quickbooks Pro, Solomon IV-Read Consolidation File, and Solomon IV-Transaction Import Utility.
AutoPay

Enable automatic renewal of membership fees and recurring donations using the member or donor’s credit card. The option can be made available to members and donors in the Join Now and Give Now pages of your website.

You can set your website to invite the member and donor to opt in, or to opt out of automated renewals, or even have the option switched on for all new members and donors.

Key Features:

- Offer members and donors the choice of easy, automated payments.
- Maximize member and donor retention with automated renewals and recurring donations.
- Enable members to discontinue automatic payments at any time.
- Set automatic payment options in the join or renewal process as either off, opt-in, opt-out or always on.
- Set recurring donation options in the online give now pages as either off, opt-in, opt-out or always on.
- Differentiate between automatic and non-automatic renewals so your members are billed accurately.
- Staff can manually add members to the automatic membership renewal program.
- Staff can preview membership fees and donations to be collected, and submit for collection.
- Securely store member credit card details in a PCI-compliant manner.
Orders

With iMIS 20 your members, donors, and other constituents can buy products, track their order status, and review their order history online or through a mobile device. Your organization can easily create an online store and manage product inventory levels.

Key Features:

- Provide flexible pricing and promotional discounts.
- Handle additional miscellaneous charges such as freight, handling, and shipping.
- Calculate freight charges based on the total weight of the order, total value of the order, or the total quantity of items ordered.
- Automatically calculate sales tax, including US State/Local, Canadian HST/GST/PST, European VAT, or Australian/New Zealand GSTINC.
- Process partial or full prepayment information for cash, checks, and credit cards.
- Optionally generate and track backorders when insufficient stock allows only partial shipment or no shipment.
- Automatically release backorders when shipments arrive, or release backorders manually.

Inventory

With iMIS 20 your members, donors, and other constituents can buy products, track their order status, and review their order history online or through a mobile device. Your organization can easily create an online store and manage product inventory levels.

Key Features:

- Monitor inventory levels and conduct inventory inquiries.
- Create relationships between products for purposes of cross-selling, up-selling or offering replacements for out-of-stock items.
- Maintain quantities of all products in multiple locations and transfer quantities between locations.
Online/Mobile Store

Allow your members to join or renew their membership fees online or through a mobile device.

- Use standard Store web pages or easily change page design with drag and drop simplicity.
- Accept Credit/Debit Card, Direct Debit/ACH/EFT, and PayPal for product sales.
- Adding shipping and tax information to product sales including US State/Local, Canadian HST/PST/GST, European VAT, and Australian GSTINC.
- Display related items for upsell and cross-sell opportunities.
- Create general or product-specific promotion codes that can be applied during the checkout process.
- Enable members to register for events, renew membership, or donate to your organization buying products.
- Empower members to promote your products on popular social media sites like Facebook, Twitter, and LinkedIn.
Advertising (Spacemaster)

Manage your organization's advertising opportunities from sales through insertion. Maintain and manage a directory of advertisers and agency contracts. Track ad sales by account and by agency.

You can also analyze activity for sales forecasting, and create reports that summarize ad activity by publication, account, territory, sales rep, time period or ad type.

Key Features:

- Maintain a directory of advertisers and agencies.
- Track ad sales by account or agency.
- Customize and automate multiple rate cards.
- Process orders for many types of ads — display, classified, web.
- Apply special pricing with discounts and surcharges.
- Generate automatic insertion orders.
- Enter contract options once, one contract serves as template for each order as it recurs.
- Generate invoices and manage collection efforts through iMIS AR/Cash.
- Record production details.
- Automate the placement of display ads and classified ads.
- Output ad placements to any layout or production software.
- Attach images of ads to order screens.
- Manage preparation of digital materials so they are print ready through an online link.
- Summarize ad activity by publication, account, territory, sales rep, time period, or ad type.
- Analyze sales performance with forecasting, competitive tracking, goals and quotas.
Continuum — Business Intelligence

With iMIS 20, all interactions with your members, donors, and constituents — whether online or offline — are stored in one centralized database. This is a game-changing opportunity for your organization to generate in-depth intelligence on constituents with custom reports and uncover key trends across the entire organization with executive dashboards.

You can also determine how your organization’s performance compares to other similar not-for-profit organizations and identify exciting new growth opportunities with sophisticated but easy-to-use predictive analysis and modeling tools.

Key Modules:

- **Reports**: Create, deploy, and manage reports for your organization with Microsoft SQL Server Reporting Services (SSRS).
- **Dashboards**: Monitor, analyze, and improve the performance of membership, fundraising, events, product sales, and other program areas.
- **RFM Analysis**: Identify your best prospects with iMIS RFM (Recency, Frequency, Monetary) Analysis modeling and predictive analytics.
- **Advanced Analytics**: Store and protect your data in a data warehouse, drill down to unearth trends and patterns, and analyze performance over time.
Reports and Dashboards

iMIS 20 includes reports and dashboards so you can monitor, analyze, and improve the performance of membership, fundraising, events, product sales financials, and other program areas.

iMIS 20 natively supports Microsoft SQL Server Reporting Services (SSRS) and Crystal Reports and includes standard executive dashboards. You can modify existing standard reports or dashboards or easily create your own.

Key Features:

- Modify existing reports or create your own using MS SQL Server Report Designer or Crystal Reports.
- Use Microsoft SQL Server Reporting Services (SSRS) for automating distribution and management of reports across your organization.
- Track Key Performance Indicators (KPIs) using visual dashboards.
- Modify existing visual dashboards or easily build your own.
- Measure year over year progress towards Key Performance Indicators (KPI) and compare performance to other industry leading organizations with the Guided Performance Scorecard (GPS) dashboard.
RFM Analysis

RFM Analysis is an analytical tool that provides rankings for your contacts based upon their financial participation with the organization. It is a very commonly used tool for fundraising, but its applications are not limited to the fundraising marketplace.

Any organization that targets contacts based on past participation can benefit from RFM Analysis. RFM Analysis relies upon three core elements that turn transactional data into a three-dimensional score based on Recency, Frequency, and Monetary Value.

Key Features:

✓ Define ranking scores for recency, frequency, monetary, combined (calculated), and total (calculated) values.
✓ Rank and organize your customer population into specific groups manually or automatically.
✓ Create groups, such as quintiles, that reflect the relative ranking of customers according to all RFM measurements.
✓ Analyze transaction patterns to accurately predict future behavior.
✓ Define different customer population and transaction queries to include in each analysis.
✓ Generate segments that divide the population into categories based on RFM criteria.
✓ Generate lists of potential customers for marketing campaigns.
✓ Define different customer population and transaction queries to include in each analysis.
✓ Record a customer’s first, last, and highest transaction amounts and the dates of the first and last contact.
✓ Rank and organize your customer population into specific groups manually or automatically store a combined ranking and a total ranking score.
✓ Rank customer groups according to the relative recency, frequency, and monetary scores of their transactions.
✓ Predict a customer’s response to a marketing campaign based on the customer’s transaction history.
Analytics

This turn-key business intelligence solution provides your organization with a secure data warehouse and the tools to analyze the performance of your organization in ways that are tedious or impossible with standard reporting tools.

Analytics creates a data warehouse and online analytical processing (OLAP) database that is tailored specifically for your iMIS database. Every night, your data is automatically extracted from the iMIS database and stored in the data warehouse so that you have a complete historical record of all your iMIS data.

Key Features:

✓ Automatically store and protect your iMIS data in a separate database, called a Data Warehouse, in a way that maintains a complete historical record of your iMIS data.
✓ Comes with a pre-defined iMIS data cube that includes eight measure groups that are designed to give you the best combination of multi-dimensional views into your iMIS data: Revenue, Membership, Opportunities, Fundraising, Marketing, Inventory, Issues, Accounting.
✓ Users can rapidly query iMIS information to create sophisticated charts and grids, decomposition trends, perspective views, performance maps, and key performance indicator measures.
✓ Improve iMIS system performance by moving reporting and querying activity against the Data Warehouse.
✓ Designed for use with ProClarity Professional, an industry-leading OLAP viewer but also compatible with other industry standard data viewers, including Microsoft Excel, Microsoft Analysis Viewer, and cubeSlice.
✓ OLAP viewer requires no knowledge about designing reports or performing SQL queries.
✓ Eliminates the need to run reports on a daily basis for manual comparison.
RiSE — Web Development Platform

The RiSE web development platform, the foundation of iMIS 20, fuses database management and web publishing into a single, easy-to-use application. With iMIS 20, your website and your business system are one and the same.

Key Features:

- Optimized for mobile devices with responsive templates, page layouts, and widgets.
- Modify and create iMIS queries, fields, menus, screens, and web pages.
- Automate workflow including alerts, emails, reports, and more.
- Integrates to a variety of web Content Management Systems (CMS) or can be used to manage your entire web presence.

Key Modules:

- Page Builder: Quickly and easily build and deploy web pages.
- Site Builder: Manage navigation and content across one or more websites.
- Query Builder: Easily create complex queries and export the results into a variety of file formats.
- Process Automation: Use pre-built tasks and alerts to automate manual processes.
- Translator: Translate fields, menus, screens, and web pages to different languages.
- Data Import/Export: Easily import and export data, including financial transactions, in a variety of formats.
- API: Integrate to external applications via SOA and REST APIs.

iMIS 20 meets the Web Content Accessibility Guidelines (WCAG), developed by the World Wide Web Consortium, which covers a wide range of recommendations for making web content more accessible.
Page Builder

Page Builder is a powerful tool for creating and publishing web pages. It can be used to easily modify existing constituent self-services web pages – such as online profile pages, directory pages, membership join pages, donation pages, event registration pages, store pages and more – or iMIS staff administrative screens without affecting the product upgrade path.

Easy Edit

Edit web pages on the fly with Easy Edit. Easily change headers, body content, images, security settings, meta-data, page layout, responsive design and more all within the context of the web page without having to drill down through folders.

Responsive Page Layouts

Control page design by dragging and dropping layout widgets onto your page template. Make 2-Column, 3-Column, 2 over 3 Column, or whatever page layout you like. Easily manage a page’s Responsive Design by selecting which sized device content should appear on.

Content Gallery

The RiSE Content Gallery is a library of functional widgets or “Dynamic Content Items” that can be used to publish queries, charts, or data to web pages. Dynamic Content items can be used in a variety of ways, and in many different combinations to meet your organization’s needs. Some examples of Dynamic Content Items include:

- **Lists**: Use any query created with the iMIS Query Builder to display a dynamic list on a web page. Lists can contain any data elements in the original query and can be sorted on the fly. List results can be exported to a variety of file formats.

- **Charts**: Display query results in a variety of visual formats such Area, Bar, Line, Pie, and more. Combine charts to create custom reports/dashboards – such as Board or Annual Report – accessible on the web.

- **Marketing**: Display the profile pictures of everyone who has registered for an event, made a donation, or ordered a particular product, or to display products in the same category.

- **Social Sharing**: Empower constituents to easily share content, products, events, and fundraising campaigns from your website to popular social media sites like Facebook, Twitter, and LinkedIn.

- **Web Plug-Ins**: You can install and display any JavaScript-based web plug-ins to a RiSE web page such as a YouTube video, Google map, or other web plug-in.
Site Builder

RiSE includes a full-featured web Content Management System (CMS). The iMIS staff administrative site is built with RiSE — which makes it easy to modify navigation, menus, and screens to meet the unique needs of your organization. For many organizations RiSE is also powerful enough to manage their entire web presence.

Responsive Templates

RiSE includes a selection of responsive quick start sites loaded with the features you need to quickly, conveniently, and affordably launch your new website or microsite. You can easily tailor the layout, fonts, and colors to meet the unique branding needs of your organization.

- **Member Site**: Includes everything you need to allow your members to manage their profile, renew dues, buy products, register for events, and participate in online communities.
- **Donor Site**: Includes everything you need to engage your supporters and raise money online.
- **Event Site**: Provides a "microsite" to support critical events, such as your organization’s annual conference.

Sample Templates
Content Management and Tagging

RISE includes everything needed to manage content across one or more websites.

- Manage multiple websites and allow chapters or affiliates to manage their own websites.
- Create content once and share it across multiple websites.
- Assign and manage content management responsibility to individuals or groups within your organization.
- Categorize content and allow users to identify areas of interest using your organization's unique terms, audiences, and/or concepts.
- Use your organization’s specific terms, audiences, and/or concepts — as well as contact, demographic, and transactional data from within your iMIS database — to deliver targeted web content to your constituents.
- Allow keyword searches to be targeted according to your organization's terms, audiences, and/or concepts.
- Use a unified search option to search not only web content but also elements of your iMIS database such as contacts, events, products, documents and more.

Sample Client Websites

<table>
<thead>
<tr>
<th>Institute of Information Security Professionals</th>
<th>Down Syndrome Victoria</th>
<th>Girl Guides Canada</th>
<th>National Restaurant Association</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="iisp.org" alt="iisp.org" /></td>
<td><img src="downsyndromevictoria.org.au" alt="downsyndromevictoria.org.au" /></td>
<td><img src="girlguides.ca" alt="girlguides.ca" /></td>
<td><img src="employeeedge.org" alt="employeeedge.org" /></td>
</tr>
<tr>
<td><img src="buildersassociation.org" alt="buildersassociation.org" /></td>
<td><img src="accessola.org" alt="accessola.org" /></td>
<td><img src="cpahq.org" alt="cpahq.org" /></td>
<td><img src="guidesvic.org.au" alt="guidesvic.org.au" /></td>
</tr>
</tbody>
</table>

Visit [www.advsol.com/webportfolio](www.advsol.com/webportfolio) for more sample client websites.
Query Builder

Query Builder — also referred to as the Intelligent Query Architect (IQA) — is a query-building tool that extracts data from the iMIS database. It simplifies query-building tasks by providing a user-friendly interface that makes it easy for a user with limited SQL experience to build queries and reports.

Key Features:

- Design a query once and use it throughout the iMIS system.
- Copy and combine existing queries to define new ones.
- Use query results for real-time, searchable, and sortable displays of information online such as member directories, committee rosters, upcoming events, and more.
- Use query results to build real-time dashboard reports.
- Combine query results with report formats in Microsoft SQL Server Reporting Services (SSRS) to create, access, modify, and share reports.
- Allow non-technical users to run queries to build marketing lists.
- Allow non-technical users to sort results on any fields in the query.
- Allow non-technical users to export query results to a variety of file formats such as CVS, XML, PDF, or Microsoft Excel/Word.
Process Automation

Process Automation helps you improve staff productivity and constituent engagement by automating manual tasks and communications.

Your constituents receive timely and relevant communications — such as a new member welcome, donation thank you, or event reminder — without burdening your staff so nothing falls through the cracks.

Key Standard Features:

✓ Automatically display alerts to your website users regarding important information such as missing an email address, when membership fees are due, or when a constituent is also a major donor.
✓ Automatically display alerts to your staff users regarding important information such as missing email, membership fees overdue, or major donor.
✓ Configure the look and wording of the alerts and to control where and to whom the alerts display.
✓ Automatically send PDF reports or pre-created emails — such as new member welcome, donation thank you, or event confirmation and reminders — at regular intervals on the dates and times you specify.
✓ Reports and emails can be scheduled to send one time, daily, weekly, or monthly.
✓ Reports and emails can be static or personalized to the recipient.
✓ Process Automation includes several out-of-the-box alerts and emails.

Key Plus Features:

✓ Modify existing alerts and scheduled reports/emails or create an unlimited number of custom alerts and reports/emails.
Translator

iMIS 20 provides multi-language support through the Translator* tool. The Translator tool enables you to easily become a true multi-lingual organization by translating your website as well as your iMIS system into multiple languages.

Key Features:

- Allow website visitors to select an offered language of choice.
- Display all website content including prompts and community posts into website visitor’s language of choice.
- Remembers website visitors language selection and displays correct language upon return visits to your website.
- Allow your staff to select language of choice when using the iMIS system.
- Display field prompts, drop-down lists, and data in your iMIS system in multiple languages.
- Includes bi-directional translation so staff can enter data in one language and have it displayed in another.
- Supports any language including languages that require a double-byte character set.
- Allows for the creation and management of custom word or phrase translations.
- Allows for excluding words or phrases from translation.
Data Import/Export

iMIS 20 includes standard tools for importing contact information. Queries built with the iMIS Query Builder can be exported in a variety of formats such as as CVS, XML, PDF, or Microsoft Excel/Word.

For advanced list management you can use Acquisition Management to import contact and organization records into iMIS and store them in a prospect table separate from your main constituent database. You can include the prospect table when searching for records in your constituent database and easily convert them one by one. This enables you to maintain a database of prospects separate from your member or donor database that you can access when necessary for marketing or other activity.

Importing specific items such as orders, dues, donations, and other financial transactions can be accomplished using the Financial Data Importer.

API

iMIS 20 includes a universal web-based Application Programming Interface (API) to iMIS that can allow a wide variety of customer and partner developer applications to communicate with iMIS, regardless of technology or application platform. For instance, applications can be written in Microsoft .NET technologies, or almost any other platform such as Java, JavaScript, Adobe Flex 2 (Flash), or AJAX and do not need to be server based.

Visit http://docs.imis.com/soa for complete API documentation.
## A-Z Optional Module List (iMIS 20-300)

<table>
<thead>
<tr>
<th>Module</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts Receivable</td>
<td>Manage invoicing, cash receipts and other financial transactions.</td>
</tr>
<tr>
<td>Address Verification (included in iMIS)</td>
<td>Automatically verify and clean address information.</td>
</tr>
<tr>
<td>Advertising (Spacemaster)</td>
<td>Manage advertising opportunities from sales through insertion.</td>
</tr>
<tr>
<td>Analytics</td>
<td>Store and protect your data in a data warehouse, drill down to unearth trends and patterns, and analyze organizational performance over time.</td>
</tr>
<tr>
<td>AutoPay</td>
<td>Automate recurring (i.e. weekly, monthly, yearly) membership fees and donations.</td>
</tr>
<tr>
<td>Billing</td>
<td>Manage membership dues/fees and subscriptions with unlimited options for pricing, frequency, and accounting methods.</td>
</tr>
<tr>
<td>Campaigns</td>
<td>Offers all of the key performance tracking to see up-to-date and accurate results of all of your marketing efforts, and ongoing campaign analysis.</td>
</tr>
<tr>
<td>Certification</td>
<td>Create and manage multiple certification programs and allow applicants to apply online and track their progress.</td>
</tr>
<tr>
<td>Contacts (included in iMIS)</td>
<td>Manage contact, address, and demographic information.</td>
</tr>
<tr>
<td>CEU</td>
<td>Define and award Continuing Education Units (CEU) based on event attendance.</td>
</tr>
<tr>
<td>Contact Merge – Plus</td>
<td>Find, merge, and clean duplicate records.</td>
</tr>
<tr>
<td>Crowdfunding (Cause2Give)</td>
<td>Turn your donors into fundraisers with online peer-to-peer fundraising.</td>
</tr>
<tr>
<td>Deferred Income</td>
<td>Delay recognition of income to coincide with when income is earned matching when related expenses are incurred.</td>
</tr>
<tr>
<td>Email Marketing - Plus</td>
<td>Design, send, and track targeted email marketing campaigns.</td>
</tr>
<tr>
<td>Events</td>
<td>Manage the planning, logistics, communication, and registration for events of all types and sizes.</td>
</tr>
<tr>
<td>Financial Data Importer</td>
<td>AR Importer, Billing Importer, Donation Importer, Orders Importer</td>
</tr>
<tr>
<td>Gift Processing (Fundraising)</td>
<td>Process pledges/gifts of all types including annual, major, recurring, planned, and tribute.</td>
</tr>
<tr>
<td>Module</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Group Administrator – Plus</td>
<td>Allow a designation constituent to manage their committee, chapter, or organization information.</td>
</tr>
<tr>
<td>NRDS Interface</td>
<td>Automatically synchronize your iMIS database with the National Association of Realtors Database System (NRDS).</td>
</tr>
<tr>
<td>Online Community</td>
<td>Create and manage members-only online communities with discussion forums, document libraries, and more.</td>
</tr>
<tr>
<td>Advanced Communities (Golightly)</td>
<td>A complete cloud-based, turn-key and standalone online community solution integrated to iMIS.</td>
</tr>
<tr>
<td>Online Donations</td>
<td>Allow your donors to give online or through a mobile device.</td>
</tr>
<tr>
<td>Online Events</td>
<td>Allow your constituents to register for events and access event details including locations, agendas, speakers, registration lists, and more.</td>
</tr>
<tr>
<td>Online Billing</td>
<td>Allow your members to join or renew their membership dues/fees online or through a mobile device.</td>
</tr>
<tr>
<td>Online Profile</td>
<td>Create an online directory of constituents and allow them to manage their own profile information.</td>
</tr>
<tr>
<td>Online Store</td>
<td>Allow your constituents to buy products and access their order history online.</td>
</tr>
<tr>
<td>Orders</td>
<td>Manage products/product kits and process product orders.</td>
</tr>
<tr>
<td>Inventory</td>
<td>Manage inventory across multiple locations, manage back orders, and create relationships between products for cross-selling, up-selling, and suggesting replacements.</td>
</tr>
<tr>
<td>Process Automation – Plus</td>
<td>Automate emails, reports, and tasks and display alerts to staff and constituents.</td>
</tr>
<tr>
<td>Process Manager</td>
<td>Define and manage the workflow for sponsorships, memberships, major giving, and other large sales opportunities or complex processes.</td>
</tr>
<tr>
<td>Refunds (AP Interface)</td>
<td>Any AR item with a credit balance can be processed as a refund.</td>
</tr>
<tr>
<td>RFM Analysis</td>
<td>Rank and organize your contacts and prospects into specific groups according to the relative recency, frequency, and monetary value (RFM) scores of their transactions.</td>
</tr>
<tr>
<td>Segmentation</td>
<td>Segmentation assists with targeting the market or the segment of the database that is most likely to respond to the marketing effort.</td>
</tr>
<tr>
<td>Service Central</td>
<td>Process payments for dues, events, orders, and more through one data entry screen.</td>
</tr>
<tr>
<td>Translator – Plus</td>
<td>Translate fields, menus, screens, and web pages to multiple languages.</td>
</tr>
</tbody>
</table>
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