



Find Contacts IQA Search

Presented by:

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Hosted by



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iMIS 20.2.24.2819 Staff Site



- iMIS**
- Community
 - Dashboard
 - Find contacts
 - Add contact
 - Manage duplicates (13)
 - Committees
 - Communities
 - Security
- Membership
- Fundraising
- Events
- Commerce
- Marketing
- Certification
- Continuum
- RISE
- Settings

Keyword search

Mr. Brian Murphy

Individuals
4,992
 current total
[Edit source query](#)

Organizations
283
 current total
[Edit source query](#)

Unique logins
4
 past 3 months
[Edit source query](#)

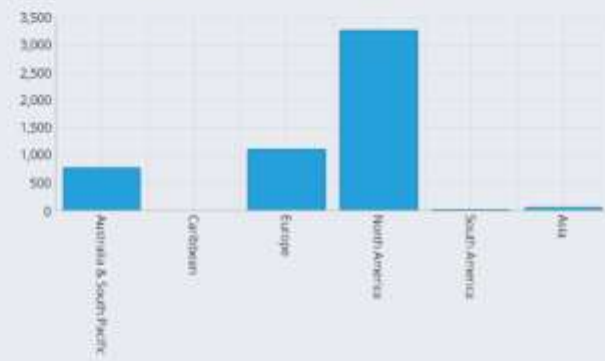
Recent posts
8
 past 3 months
[Edit source query](#)

Committee members



- Education Committee
- Technology Committee
- Volunteer Committee
- Membership Committee
- Awards Committee
- Finance Committee
- Governance Committee
- Board of Directors
- Governmental Affairs Committee

Contacts by region



[Contact reports](#)

Recent history

- [Alex Moore](#)
- [Clear History](#)

- Top committees**
- Top participants
- Top orgs
- Data integrity

Committee	Number of Members
Education Committee	22
Technology Committee	18
Volunteer Committee	17
Marketing Committee	16
Finance Committee	15



Keeping the old look and feel.



The screenshot displays the iMIS Site Builder interface. At the top, there is a navigation bar with icons for Community, Membership, Fundraising, Events, Commerce, Marketing, and Certifica. Below this is a toolbar with options like Organize, New, Edit, Import, Export, Versions, Publish, and Preview. A left-hand sidebar contains various site management tools such as Manage sitemaps, Manage websites, and Manage shortcuts. The main content area shows a tree view of sites, including 'iMIS Web View', 'Core Sites', and 'Quick Start Sites'. The 'STAFFOLD' site is highlighted. To the right, an 'Advanced' settings panel is visible, featuring dropdown menus for Theme (Everest), Template (master page) (Mountains), and other options. Blue arrows point to the 'Manage websites' link in the sidebar, the 'STAFFOLD' site in the tree, and the 'Everest' and 'Mountains' dropdown menus in the settings panel.

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What we are talking about today.



Find Contacts (People)

The screenshot shows the iMIS web application interface for finding contacts. On the left is a dark sidebar with navigation options: Community, Membership, Fundraising, Events, Commerce, Marketing, Certification, Continuum, and RiSE. The main content area has a search bar at the top with the text "Keyword search". Below the search bar are two tabs: "People" (selected) and "Organizations". The "People" tab contains a form titled "Enter search criteria to find people" with the following fields: "Last name starts with", "First name starts with", "City starts with", "State Province" (dropdown menu), "Country" (dropdown menu), "ID equals", and "Company starts with". A blue "Find" button is located below the form. A message at the bottom of the form reads "Please enter your search criteria to view results". On the right side of the search area, there is a "Select a query" dropdown menu with a list of search options: "PeopleSearch", "By all common criteria", "By all criteria (multi select fields)", "By committee (active mbrs)", "By ID", "By location", "By name", "By task date", "By type", and "People search public".



What are we going to do?



The screenshot shows the iMIS web application interface. On the left is a dark teal sidebar with a navigation menu including: Community, Dashboard, Find contacts, Add contact, Manage duplicates (PLUS), Committees, Communities, Security, Membership, Fundraising, Events, Commerce, Marketing, Certification, Continuum, RISE, and Settings. The main content area has a top navigation bar with a search box labeled 'Keyword search', a user profile for 'Mr. Brian Murphy', and icons for refresh, shopping cart, and help. Below this is a tabbed interface with 'People' selected. The 'People' tab contains a search form titled 'Enter search criteria to find people' with a 'Select a query' dropdown. The form includes fields for: Last name starts with, First name starts with, City starts with, State Province (dropdown), Country (dropdown), ID equals, Company starts with, and Expires in # of days. A blue 'Find' button is at the bottom left of the form. Below the form is a message: 'Please enter your search criteria to view results'. At the bottom of the main content area is a section titled 'Recent contacts'.



People Search – IQA Directory



The screenshot shows the iMIS People Search interface. On the left is a dark navigation menu with the iMIS logo at the top. The menu items include: Community, Membership, Fundraising, Events, Commerce, Marketing, Certification, Continuum, RISE (highlighted with a blue arrow), Site Builder, Page Builder, Tagging, Maintenance, Intelligent Query Architect (highlighted with a blue arrow), Business Object Designer, Process automation PLUS, and Document system. The main content area has a search bar at the top with the text 'Keyword search'. Below the search bar is a toolbar with buttons for Organize, New, Edit, Import, Export, Versions, and Publish. The address bar shows the path: \$/ContactManagement/DefaultSystem/Queries/Direct. The file explorer shows a tree structure: Communications, CommunityManagement, ContactManagement (highlighted), DefaultSystem (highlighted), Queries (highlighted), Advanced, Contacts, Directory (highlighted), Committees, Contacts, OrganizationSearch, PeopleSearch (highlighted), FindContacts, FundRaising, Groups, Organizations, Recent Activities, and Reports. On the right side of the file explorer, there is a list of search criteria: By all common criteria, By all criteria (multi select fields), By committee (active mbrs), By ID, By location, By name, By task date, By type, and People search public. At the bottom of the interface, there is a footer with the text: © ASI | Documentation | Support.

- RISE
- Intelligent Query Architect
 - ContactManagement
 - Default System
 - Queries
 - Directory
 - PeopleSearch



Keep in mind UPGRADES!!



iMIS

- Community
- Membership
- Fundraising
- Events
- Commerce
- Marketing
- Certification
- Continuum
- RiSE**
 - Site Builder
 - Page Builder
 - Tagging
 - Maintenance
- Intelligent Query Architect**
- Business Object Designer
- Process automation **PLUS**
- Document system

Keyword search

Organize New Edit Import Export Versions Publish

ect Go

- By all common criteria
- By all criteria (multi select fields)
- By committee (active mbrs)
- By ID
- By location
- By name
- By task date
- By type
- People search public

FindContacts

FundRaising

Groups

Organizations

Recent Activities

Reports

Folder: PeopleSearch (Published)
Updated by: Gary Herman on 10/20/2011
Description:

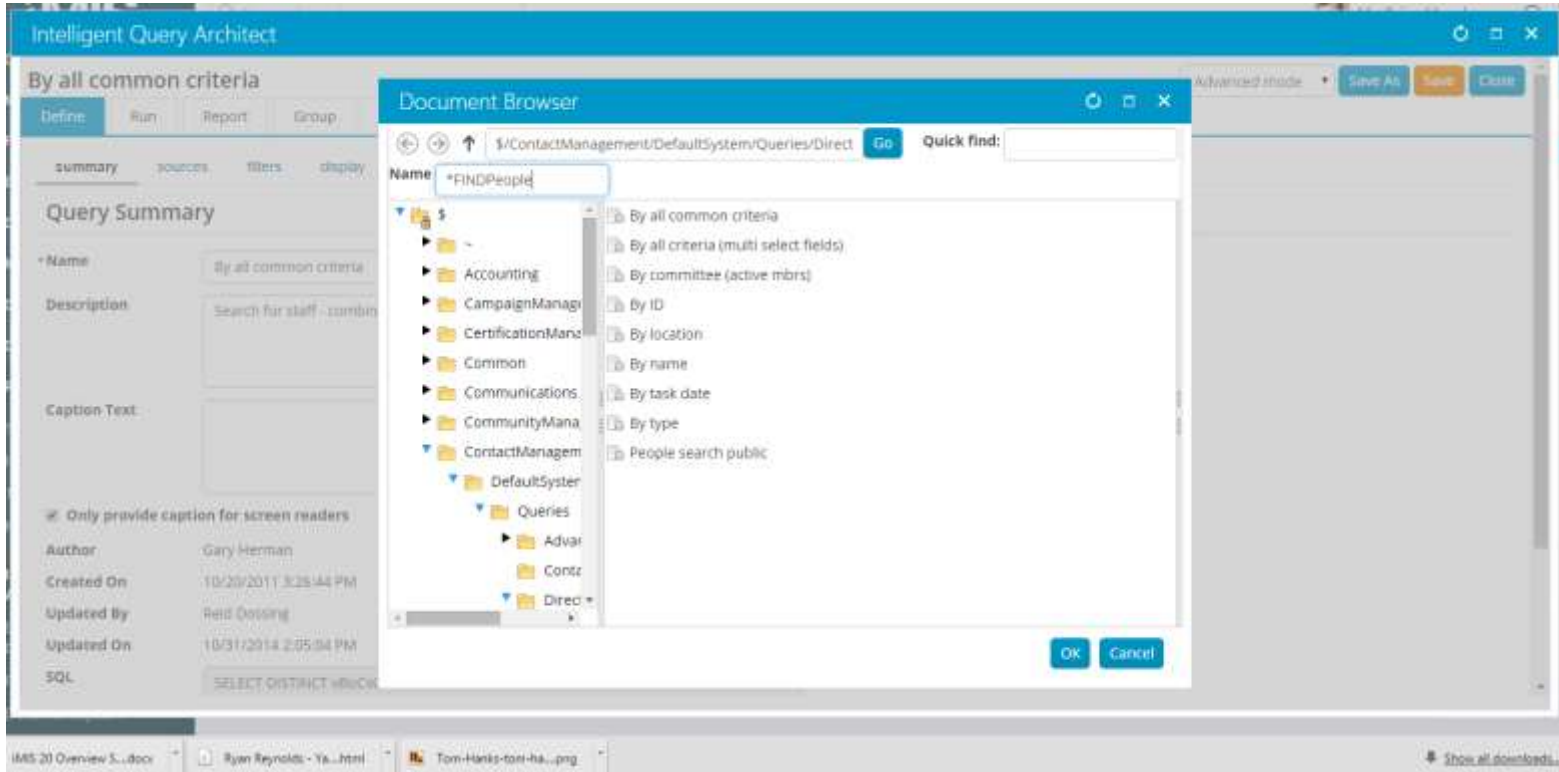
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These are standard out of the box IQAs that will be overwritten in an upgrade!



Make a copy & give it a name starting with an *

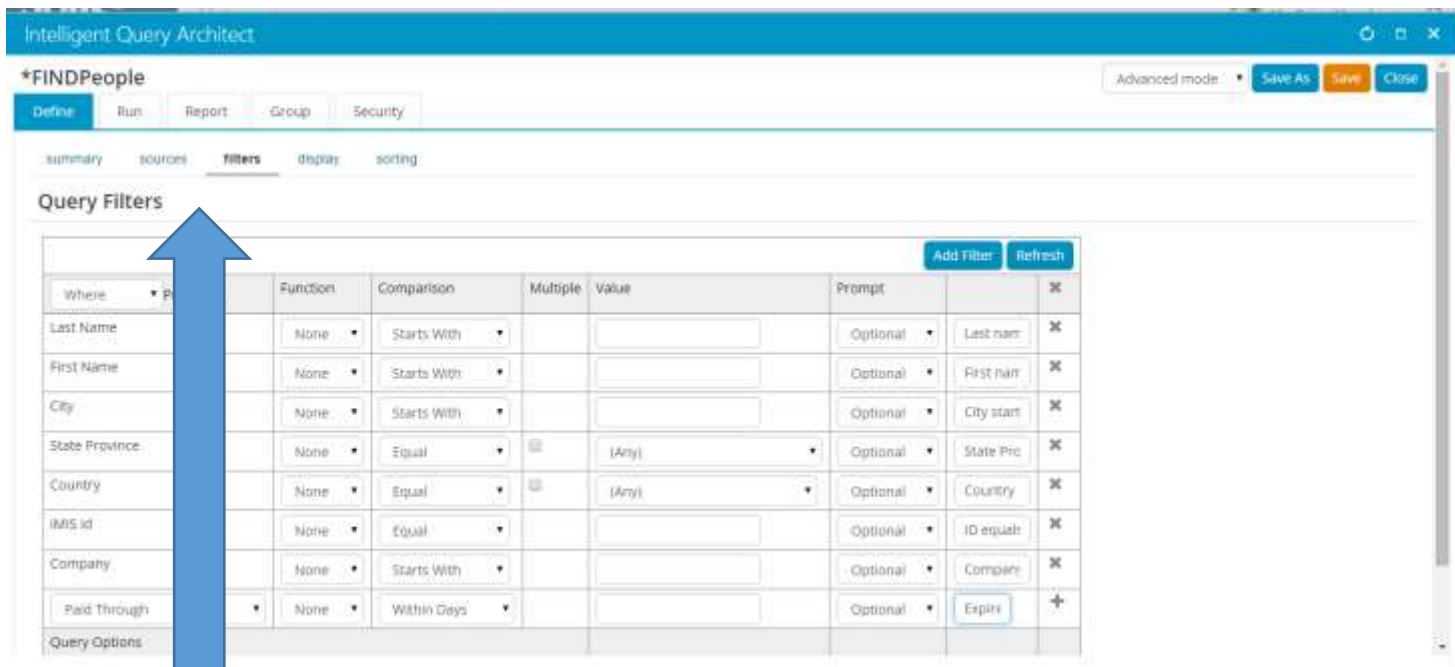


Double Click on By all common criteria – then click on Save As
Give it a name that starts with an asterisk *

*The * will make it go to the top of the list and it will become our default. You could also start it with a "." period or something starting with "A", just needs to be alphabetical.*



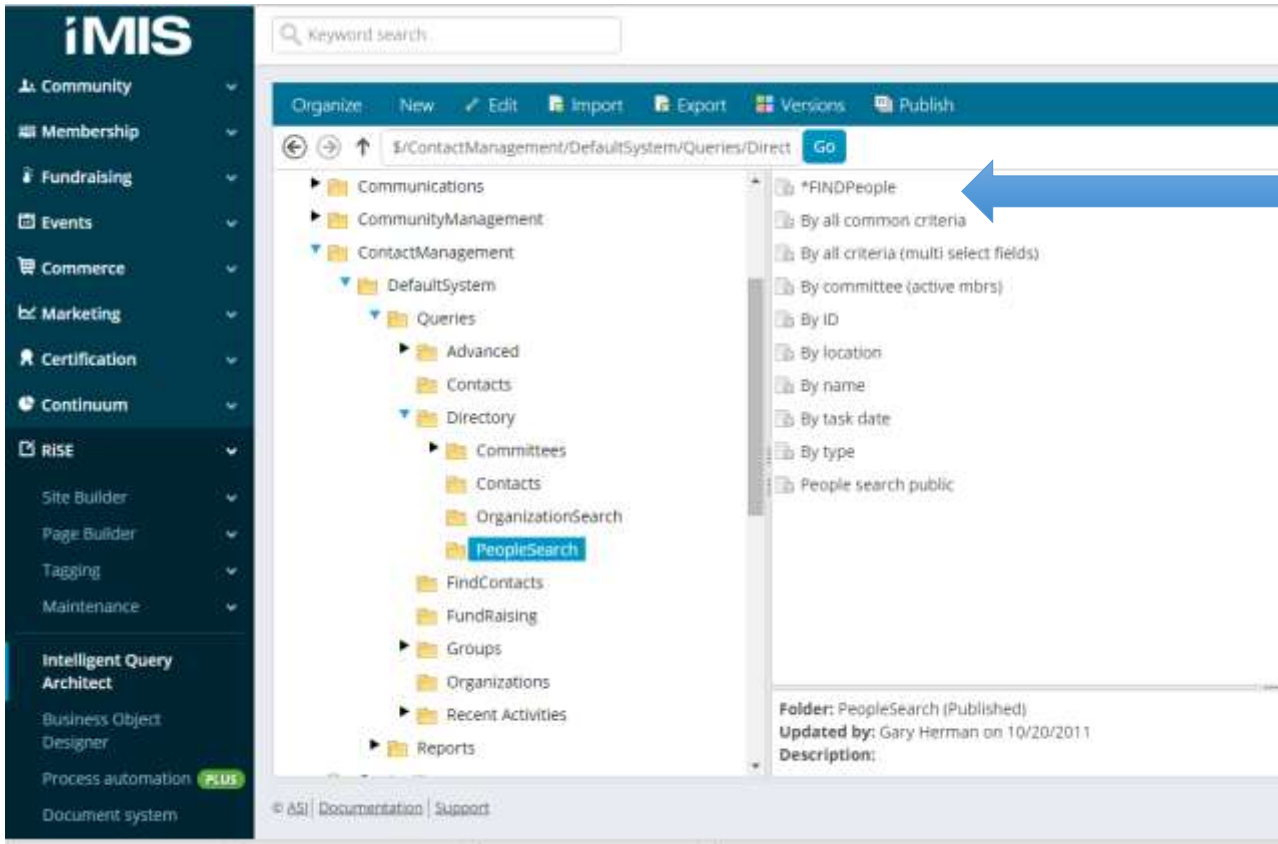
Add Paid Through using "Within Days" Search



Under Filters

Property
 Comparison
 Prompt
 Title **"Expires Within Days"**
 Paid Through
 Within Days
 Optional

Don't forget to hit the PLUS SIGN! Save and Close



This **SHOULD** be protected in an upgrade!

But you should always play it safe and keep a copy.

Select the IQA – Click on Organize/Copy, then Organize/Paste in new folder.

I recommend making a directory “.ABC (your acronym)” .



Custom IQA Folder



The screenshot shows the iMIS software interface. On the left is a dark blue sidebar with the iMIS logo and a list of navigation items: Community, Membership, Fundraising, Events, Commerce, Marketing, Certification, Continuum, RISE, Site Builder, Page Builder, Tagging, Maintenance, Intelligent Query Architect, Business Object Designer, Process automation (with a PLUS badge), Document system, and Workflow. The main content area has a search bar at the top with the text 'Keyword search'. Below it is a light blue notification bar that says 'Copy succeeded.' with an information icon. A toolbar contains buttons for Organize, New, Edit, Import, Export, and Versions. Below the toolbar is a breadcrumb path '\$/.Christine' with a 'Go' button. The main area is divided into two panes. The left pane, titled 'IQA Folders', shows a tree view of folders under a root folder '\$'. The folder '.Christine' is selected and highlighted in blue. Other folders listed include '~', Accounting, CampaignManag, CertificationMana, Common, Communications, CommunityMana, ContactManagem, ContentItems, ContentManagem, Directory, EventManagemer, ExperienceManag, Fundraising, Mobile, and NRDS. The right pane shows a file named '*FINDPeople'. At the bottom right, there is a metadata section for the selected folder: 'Folder: .Christine (Published)', 'Updated by: Mr. Brian Murphy on 9/28/2015', and 'Description:'.



RESULTS



- iMIS**
- Community
 - Dashboard
 - Find contacts
 - Add contact
 - Manage duplicates **PLUS**
 - Committees
 - Communities
 - Security
- Membership
- Fundraising
- Events
- Commerce
- Marketing
- Certification
- Continuum
- RISE
- Settings

Keyword search

Mr. Brian Murphy

People Organizations

Enter search criteria to find people [Select a query](#)

***FINDPeople**

Last name starts with

First name starts with

City starts with

State Province

Country

ID equals

Company starts with

Expires in # of days

Find

Please enter your search criteria to view results

Recent contacts



Organization Search



iMIS

- Community
- Membership
- Events
- Commerce
- Marketing
- Certification
- Continuum
- RISE**
 - Site Builder
 - Page Builder
 - Tagging
 - Maintenance
 - Intelligent Query Architect
 - Business Object Designer
 - Process automation
 - Document system**
 - Workflow

Keyword search

Organize New Edit Import Export Versions Run

\$/ContactManagement/DefaultSystem/Queries/Direct Go

- ~
- Accounting
- AGC Queries
- CertificationManagement
- Common
- Communications
- CommunityManagement
- ContactManagement
 - DefaultSystem
 - Queries
 - Advanced
 - Contacts
 - Directory
 - Committees
 - Contacts
 - OrganizationSearch**
 - PeopleSearch
 - FindContacts

All organizations
Organization search public

Query: All organizations (Published)
Updated by: MANAGER on 2/7/2014
Description:

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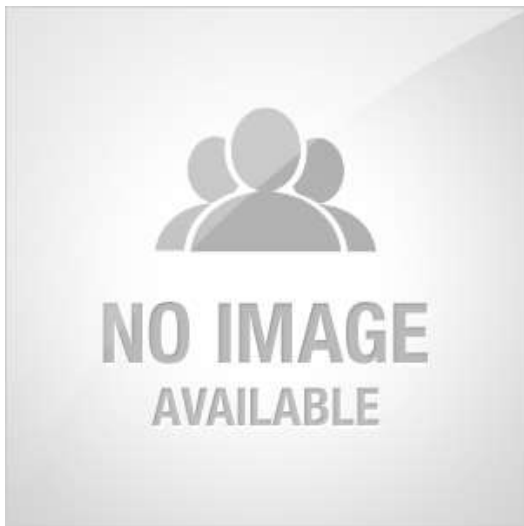
- RISE
- Document System
- ContactManagement
- Default System
- Queries
- Directory
- OrganizationSearch



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