



# WEBINAR SERIES

# iMIS-Integrated Constant Contact

A Cost-Effective & Powerful Email Solution

Presented by:  
Association Technology Solutions





# About ATS

- Serving iMIS community since 1995
- Full-service Authorized iMIS Solutions Provider (AiSP)
- Application development to extend the functionality of iMIS
- iMIS Bridge powered by ATS with over 120 integrations
- ASI's Client Sales Leader of the Year and Chairman Circle for 2020





# Presented by



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- a) Attendees are muted to reduce background noise
- b) Raise your hand to get the attention of the presenter/moderator
- c) Download handouts  
(not typically provided for ATS webinars)
- d) Ask questions to be answered during Q&A after presentation is complete

- **iMIS Advanced Email** – A module of iMIS that lets you architect and send emails right out of iMIS. Tracks sends, opens, bounces, etc.
- **Informz** – A product of Higher Logic. ATS is working with Higher Logic to create the next generation of this integration.
- **Real Magnet** – A product of Higher Logic. ATS has provided the bridge to Real Magnet for over 10 years.
- **MailChimp** – This is an ATS integration with iMIS Bridge. It pushes data to MailChimp and pulls back sends, opens, bounces, etc.
- **Constant Contact** – This is an ATS integration with iMIS Bridge. It pushes data to Constant Contact and pulls back sends, opens, bounces, etc.

- From <https://www.constantcontact.com/>
  - Constant Contact is a trusted partner in helping small businesses, nonprofits, and individuals achieve real results and move their business forward. With all the tools you need to market your ideas, we make it easy to quickly and affordably build a professional brand online, attract customers, and do more business online.
  - Email Marketing
    - Email Marketing Overview
    - Email Templates
    - Marketing Automation
    - Ecommerce Marketing
    - List Segmentation
    - Facebook & Instagram Ads
    - Social Posting & Monitoring
    - Google Ads
    - Free Trial Information
    - Pricing

- Use an IQA to push contacts, including demographics and tags, to Constant Contact
- Create lists in iMIS with IQA's that will be synched to Constant Contact
- Write back actions into iMIS activities including sends, bounces, opens, clicks, forwards, and opt-outs
- Create communication preference links to allow recipients to manage their communication preferences in iMIS without logging in.

- Constant Contact maintains a list of Contacts
- IQA's in iMIS
  - IQA needs to contain required fields (e.g., ID, Firstname, lastname, email)
  - IQA can have standard fields but are not required (e.g., jobtitle, company name, etc)
  - IQA can contain ANY other columns that will be mapped to Custom Fields in Constant Contact.
    - For example, if you add a column called PAIDTHRUDATE, to your IQA, the bridge will look to see if there is a custom field in Constant Contact that matches the name of the column. If it does not exist, the bridge will create that field in Constant Contact and populate it with the data.





# Contacts

Contact Details ✕

**Robert Bush** Cancel Save ⋮

Added by API on Jul 27, 2021 • Edited Aug 9, 2021 at 12:29 pm

**Custom Fields** Create Custom Field

FAX

ID

RESULTROW

UNSUBTOKEN

UNSUBURL





# Tags

- Tags are labels you can add to your contacts that help you group them together in ways that make sense to you. Tags can be applied to different contacts across multiple lists, so that when you send an email, you can select multiple lists, but only send to the tagged contacts on each list and ignore everyone else.
- Driven by an IQA in iMIS.
- A person can have 0 or many tags.
- If the tag does not exist in Constant Contact then the tag will be automatically created in Constant Contact





# Tags

## Contacts

Discover improvements to help you manage your contacts in this [knowledge base article](#).

Lists Segments Tags Contacts

## Insights

[→ See more insights](#)

<b>Subscribed</b> ⓘ <b>784</b>	<b>New subscribers (30 days)</b> ⓘ <b>2</b>	<b>Most engaged</b> ⓘ <b>2</b>	<b>Least engaged</b> ⓘ <b>0</b>
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4 Tags

Filter by Tag Name

<input type="checkbox"/>	Tag Name ↑	Contacts	Date Created	
<input type="checkbox"/>	Attendee	219	Jul 25, 2021	...
<input type="checkbox"/>	Committee Member	12	Jul 25, 2021	...
<input type="checkbox"/>	Donor	110	Jul 25, 2021	...
<input type="checkbox"/>	Member	161	Jul 25, 2021	...

Show 50

< Page 1 of 1 >





# Tags

Contact Details

**Robert Bush** Cancel Save ...

Added by API on Jul 27, 2021 • Edited Aug 9, 2021 at 12:29 pm

**Basic Details**

Email Address:

Subscribed Jul 27, 2021 at 12:50pm EDT by You

First Name:  Last Name:

Job Title:

Company:

Birthday:   Anniversary:

**Physical Addresses**

Home:

**Lists** Create List

- General Interest
- Members
- Recent Renewals
- UnSubTest

2 selected

**Tags** Create Tag

- Attendee
- Committee Member
- Donor
- Member



- Contact lists act as containers that store multiple email addresses together. Creating and maintaining multiple lists is the most basic way to segment your contacts into different groups based on different characteristics that are relevant to your organization. For example, you can create different lists for customers at different locations, member types, or committees.
- IQA's are created in iMIS of the iMIS ID and the list name
- If the list does not exist in Constant Contact, a new list will be created.
- If a person is no longer in the IQA they will be removed from the list but they will still have a contact in Constant Contact



# Lists

## Contacts

Discover improvements to help you manage your contacts in this [knowledge base article](#).

Add Contacts

Create List



Lists Segments Tags Contacts

## Insights

→ See more insights

Subscribed



784

New subscribers (30 days)



2

Most engaged



2

Least engaged



0

4 Lists

Filter by List Name



<input type="checkbox"/>	★	List Name ↑	Contacts	Date Created	
<input type="checkbox"/>	☆	General Interest	0	Jul 14, 2021	...
<input type="checkbox"/>	☆	Members	161	Jul 25, 2021	...
<input type="checkbox"/>	☆	Recent Renewals	98	Jul 25, 2021	...
<input type="checkbox"/>	☆	UnSubTest	16	Jul 30, 2021	...







# Lists

Contact Details

**Robert Bush**  
Added by API on Jul 27, 2021 • Edited Aug 9, 2021 at 12:29 pm

Cancel Save ...

**Basic Details**

Email Address  
1119@atsol.org Subscribed

Subscribed via API (031 AM 1:25:00pm EDT) by You

First Name: Robert Last Name: Bush

Job Title

Company

Birthdate: Month Day Anniversary

**Physical Addresses**

Home

**Lists** Create List

- General Interest
- Members
- Recent Renewals
- UnSubTest

2 selected

**Tags** Create Tag

- Attendee
- Committee Member
- Donor
- Member





# Communications Preferences

- Includes the option to use iMIS Communication Preferences in iMIS
- Opt in/Opt outs need to be incorporated into your LIST IQA's
- Includes the ability to generate a token that will let people change their communication preferences without having to login to iMIS.
- Link can be included in the email.

Dear Randy,

This is a test for iMIS Contact preferences.

Sincerely,

Aaron Milligan

---

Manage Preferences: [Subscription Prefs](#)







# Communication Preferences



- ABOUT US
- MEMBERSHIP
- EVENTS
- SHOP
- GIVE NOW
- COMMUNITIES
- MY ACCOUNT
- MANAGE
- CERTIFICATION

On Behalf Of: [\(select\)](#)

## Communication preferences

### I would like to receive:

- Conference Promotions about our exciting events!
- Communication about upcoming events
- Promotional Communication
- TEST Opt-In
- TEST Opt-Out

Unsubscribe from all

You may unsubscribe from these communications at any time.

Save

Cancel

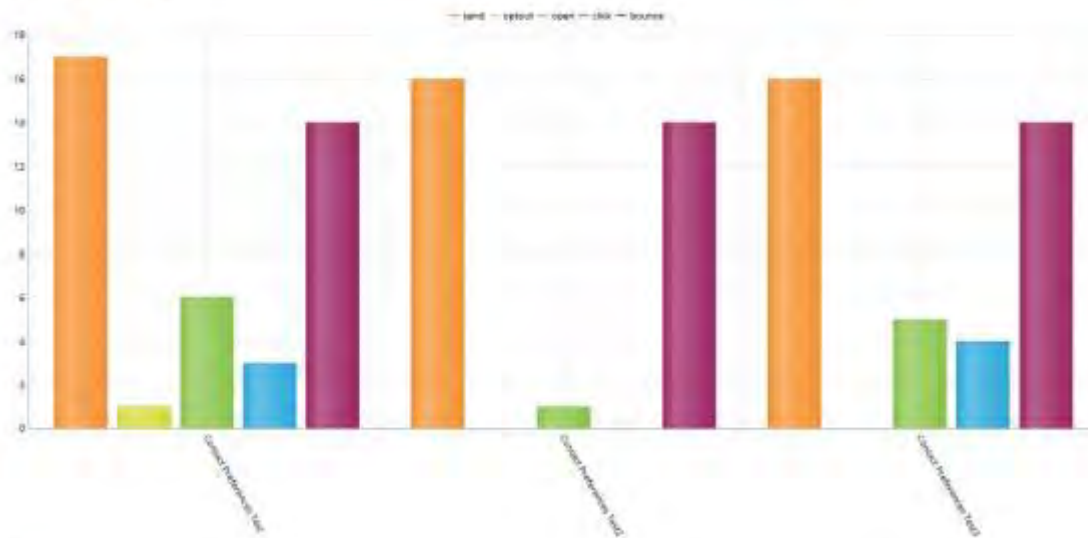




# Reports

- Sends, Bounces, Clicks, Opens, Optouts, and sends are recorded as Activity Records in iMIS along with the campaign. These can be reported on in a dashboard.

Campaigns last 30 days



Recent Campaigns

Campaign Name	Sent Date
Campaign 1	8/8/2021 12:34:31 PM
Campaign 2	7/30/2021 8:28:00 PM
Campaign 3	8/9/2021 10:37:00 AM
Campaign 4	8/4/2021 12:00:00 PM





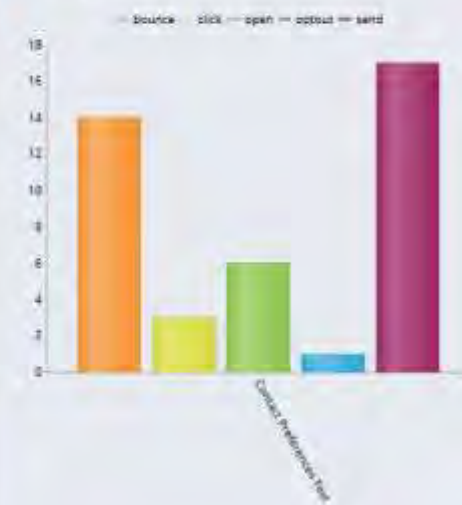
# Reports

Transaction Date: 8/9/2021 12:00 AM  
Campaign Date: Contact Preferences Test

## Bounces

ID	Full Name	Email	Bounce Reason	Campaign Name	Efficient Date
1144	<a href="#">Dorina Richter</a>	rdorina@atsol.org	B - Non-existent address: the contact's Internet Service Provider (ISP) indicates that the email address doesn't exist.	Contact Preferences Test	8/9/2021 10:35:00 AM
1179	<a href="#">Dorina Richter</a>	dorina.rdgms@atsol.org	B - Non-existent address: the contact's Internet Service Provider (ISP) indicates that the email address doesn't exist.	Contact Preferences Test	8/9/2021 10:37:00 AM
1135	<a href="#">Justin "Jick" Richter</a>	jjdicker@atsol.org	B - Non-existent address: the contact's Internet Service Provider (ISP) indicates that the email address doesn't exist.	Contact Preferences Test	8/9/2021 10:38:00 AM
1134	<a href="#">Luke Richter</a>	lricker@atsol.org	B - Non-existent address: the contact's Internet Service Provider (ISP) indicates that the email address doesn't exist.	Contact Preferences Test	8/9/2021 10:37:00 AM
1125	<a href="#">Luke Richter</a>	lricker2@atsol.org	B - Non-existent address: the contact's Internet Service Provider (ISP) indicates that the email address doesn't exist.	Contact Preferences Test	8/9/2021 10:37:00 AM
1125	<a href="#">Luke Richter</a>	lricker3@atsol.org	B - Non-existent address: the contact's Internet Service Provider (ISP) indicates that the email address doesn't exist.	Contact Preferences Test	8/9/2021 10:38:00 AM
1128	<a href="#">Luke Richter</a>	lricker4@atsol.org	B - Non-existent address: the contact's Internet Service Provider (ISP) indicates that the email address doesn't exist.	Contact Preferences Test	8/9/2021 10:38:00 AM
1125	<a href="#">Luke Richter</a>	lricker5@atsol.org	B - Non-existent address: the contact's Internet Service Provider (ISP) indicates that the email address doesn't exist.	Contact Preferences Test	8/9/2021 10:37:00 AM
1130	<a href="#">Luke Richter</a>	lricker6@atsol.org	B - Non-existent address: the contact's Internet Service Provider (ISP) indicates that the email address doesn't exist.	Contact Preferences Test	8/9/2021 10:38:00 AM
1131	<a href="#">Luke Richter</a>	lricker7@atsol.org	B - Non-existent address: the contact's Internet Service Provider (ISP) indicates that the email address doesn't exist.	Contact Preferences Test	8/9/2021 10:37:00 AM
1174	<a href="#">Randy Richter</a>	rrandy_richter@atsol.org	B - Non-existent address: the contact's Internet Service Provider (ISP) indicates that the email address doesn't exist.	Contact Preferences Test	8/9/2021 10:37:00 AM
1107	<a href="#">Sam Richter</a>	sam.richter@atsol.org	B - Non-existent address: the contact's Internet Service Provider (ISP) indicates that the email address doesn't exist.	Contact Preferences Test	8/9/2021 10:37:00 AM
1179	<a href="#">Vernasa Richter</a>	vrichter@atsol.org	B - Non-existent address: the contact's Internet Service Provider (ISP) indicates that the email address doesn't exist.	Contact Preferences Test	8/9/2021 10:37:00 AM
1178	<a href="#">Zela Richter</a>	zrichter@atsol.org	B - Non-existent address: the contact's Internet Service Provider (ISP) indicates that the email address doesn't exist.	Contact Preferences Test	8/9/2021 10:37:00 AM
1245	<a href="#">Aaron B. Test</a>	noemail@gmail.com	The content is no longer relevant to me.	Contact Preferences Test	8/9/2021 10:41:00 AM

## Campaign activity






# Reports

[About](#)
[Participation](#)
[History](#)
[Giving](#)
[Preferences](#)
[A2Z\\_BOOTHS](#)
[A2Z\\_ORDER\\_ACTIVITY](#)
[A2Z\\_OVERALL\\_ACTIVITY](#)

**UserProfileDashboard**

**Bill Wasserman**  
 Vice President  
[Prodigy Makers International](#)



**ID** 333  
**Member since** 4/1/2020  
**Member type** Individual Member  
**Status** Active  
**Paid through** 12/31/2021

**Mobile phone is missing**

**RISE Actions**

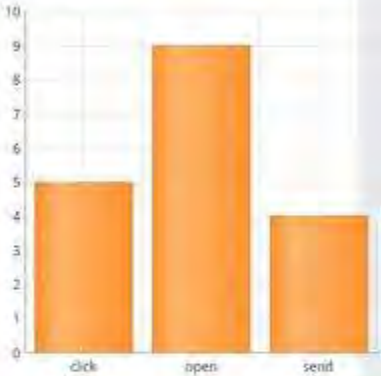
[Print info](#)
[Public Profile](#)
[Resolve Duplicates](#)  
[Donate](#)
[Order](#)
[Register](#)
[Email](#)  
[Renew Now](#)

**Marketplace Actions**

[Order](#)
[Join/Renew](#)
[Register](#)

**Constant Contact History**

ID	Status Type	Contact Name	URL	Unsub Reason	Effective Date
333	send	Contact Preferences-Test2			8/9/2021 12:25:00 PM
333	open	Contact Preferences-Test2			8/9/2021 12:38:00 PM
333	send	Activity Test 2:20 2021-26-07			7/26/2021 3:25:00 PM
333	open	Activity Test 2:20 2021-26-07			7/26/2021 3:26:00 PM
333	click	Activity Test 2:20 2021-26-07	<a href="https://www.ats.org/">https://www.ats.org/</a>		7/26/2021 3:26:00 PM
333	send	Contact Preferences-Test			8/9/2021 10:37:00 AM
333	open	Contact Preferences-Test			8/9/2021 10:39:00 AM
333	send	Contact			8/9/2021 10:39:00 AM




- Contacts are synched.
- Custom demographics are synched and new custom demographics are automatically created if they don't exist.
- Tags are synched and new tags are automatically created if they don't exist.
- Lists are synched and new lists are automatically created if they don't exist.
- Communication Preferences can be used instead of the built in Constant Contact Opt-Out
- Dashboards can report on many different pieces of data.



# Questions & Answers



*Presenter:*

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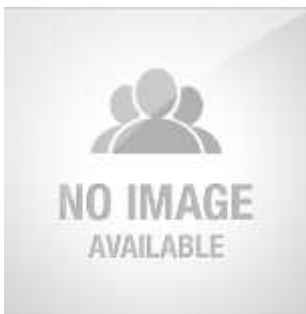
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*schedule of upcoming webinars*

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<http://atsol.org/PastWebinars>

*video recordings and  
downloadable presentation slides*

## ATS Learning Center

<https://www.pathlms.com/ats-learningcenter>

## Other Questions

Email: [info@atsol.org](mailto:info@atsol.org)

Online: <http://www.atsol.org>

Phone: (720) 945-7252

