



WEBINAR SERIES

Customizing Profiles

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



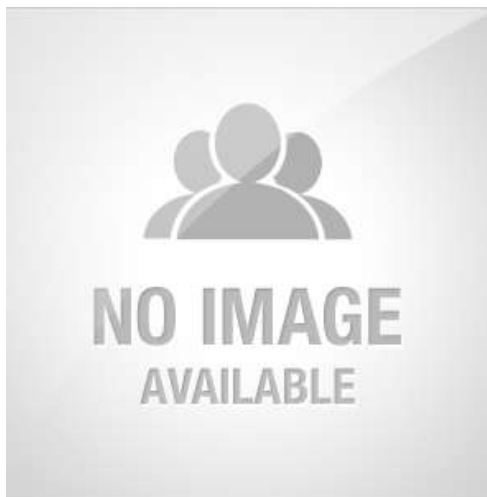
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Sales Manager

Association Technology Solutions, LLC

Email: rbanks@atsol.org





- 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

Did you know that iMIS comes with an out-of-the-box profile for both individuals and organizations? Enhancing your profiles starts with these and off you go! Determining what information a member needs to see about fellow members or organizations is key. Today's learning objectives include:

- Profiles vs My Account
- What is included out-of-the-box
- Making it configurable
- iParts to consider using
- To share or not share



Profile VS My Account

6 Pages for Contacts and Organizations





Profile VS My Account

6 Pages for Contacts and Organizations

- Full Account (/FullAccount, /OrganizationFullAccount)





Profile VS My Account

6 Pages for Contacts and Organizations

- Full Account (/FullAccount, /OrganizationFullAccount)
- My Account (/MyAccount, /OrganizationAccount)



6 Pages for Contacts and Organizations

- Full Account (/FullAccount, /OrganizationFullAccount)
- My Account (/MyAccount, /OrganizationAccount)
- Profile (/Profile, /Organization)





Included OTB - Profile

- Contact Mini Profile
 - Name, Title, Organization, Photo

The screenshot shows a contact mini profile for Mr. Brian Murphy. The profile is enclosed in a red border. It includes the following information:

- Name:** Mr. Brian Murphy
- Title:** System Administrator
- Organization:** [IMIS International](#)
- Photo:** A circular portrait of Mr. Brian Murphy.
- Biography:**
 - About:** Let's put a touch more of the r... This is where you take out all y... all that so. There we are. Remo...
 - Website:** <https://www.advsol.com>
- Chapter:** [North Chapter - Member](#)
- Committees:** [Chapter Officers - Chair](#)

Below the biography, there are social media icons for Twitter, Facebook, and LinkedIn.





Included OTB - Profile

- Contact Mini Profile
 - Name, Title, Organization, Photo
- Chapters (Group List Editor)
 - Chapter name



- Contact Mini Profile
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 - Chapter name
- Committees (Group List Editor)
 - Committee name





Included OTB - Profile

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 - Name, Title, Organization, Photo
- Chapters (Group List Editor)
 - Chapter name
- Committees (Group List Editor)
 - Committee name
- Biography (Panel Editor)
 - About, Website



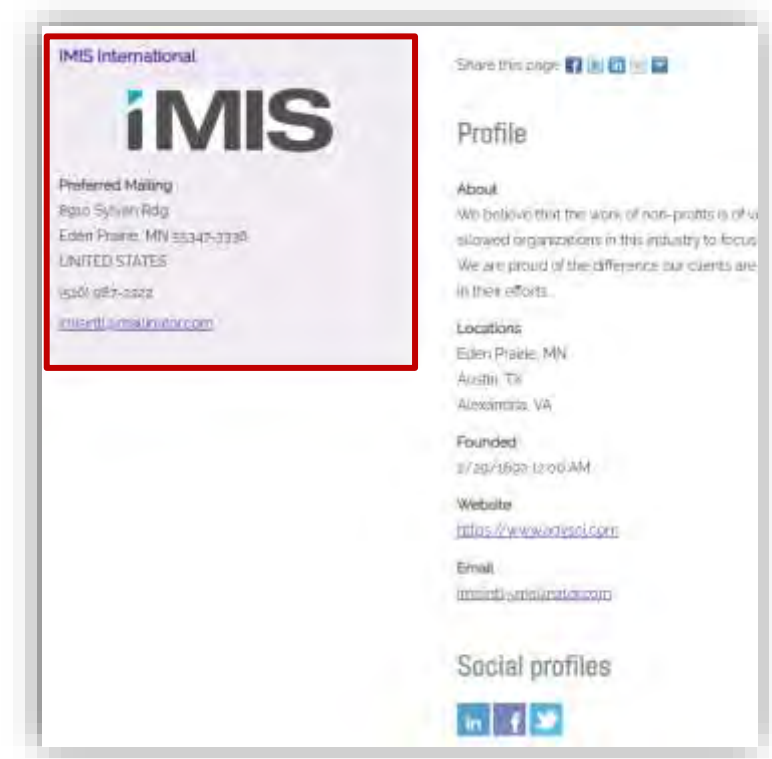
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- Biography (Panel Editor)
 - About, Website
- Social Icons
 - Twitter, Facebook, LinkedIn





Included OTB - Organization

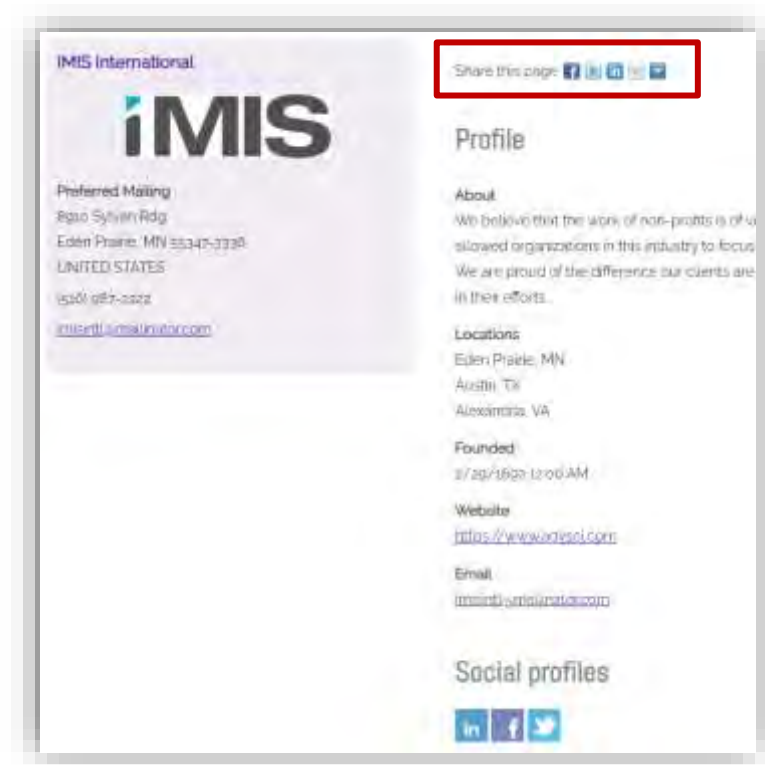
- Contact Mini Profile
 - Name, Organization, Logo, Address, Phone, Email





Included OTB - Organization

- Contact Mini Profile
 - Name, Organization, Logo, Address, Phone, Email
- Social Share



- Contact Mini Profile
 - Name, Organization, Logo, Address, Phone, Email
- Social Share
- Profile (Panel Editor)
 - About, Locations, Founded, Website, Email





Included OTB - Organization

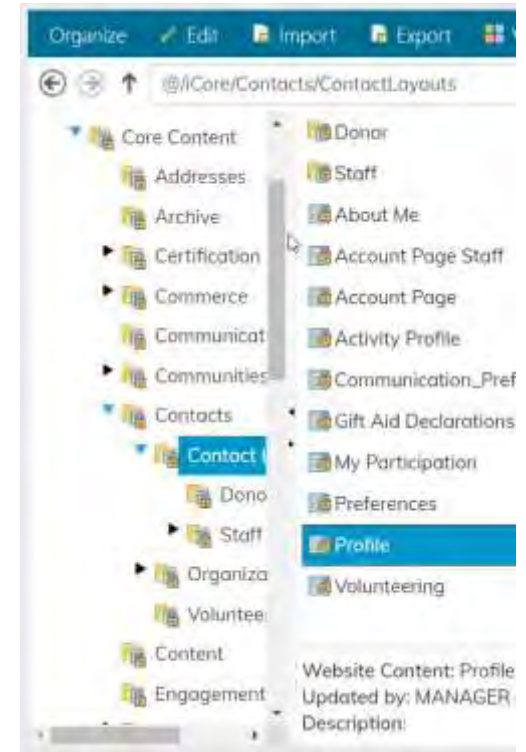
- Contact Mini Profile
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- Social Share
- Profile (Panel Editor)
 - About, Locations, Founded, Website, Email
- Social profiles
 - Twitter, Facebook, LinkedIn



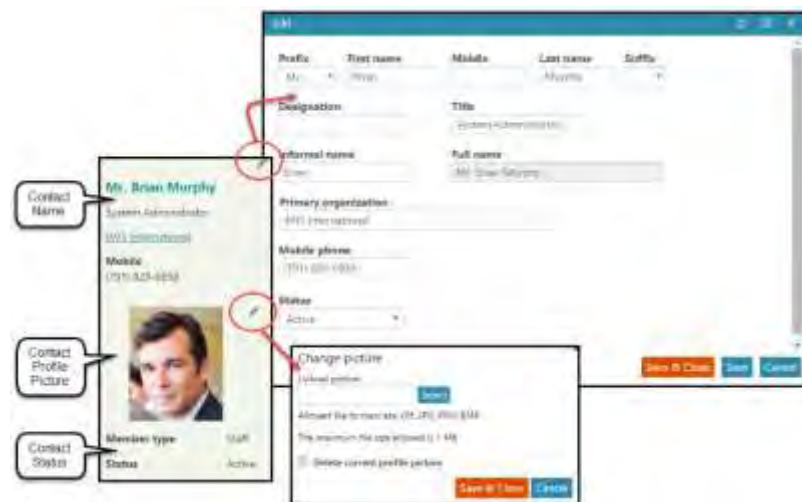


Make them Configurable

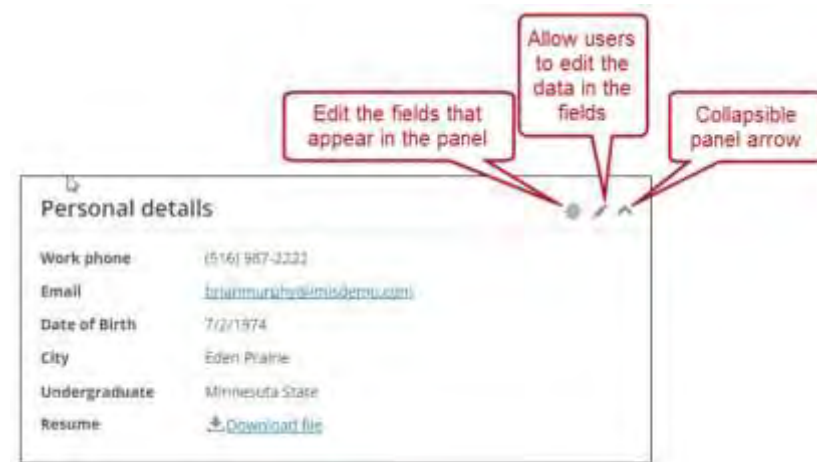
- Out-of-the-box pages are not configurable
- Create copies of the OTB pages
- Update appropriate shortcuts



- Contact Mini Profile
 - Display name, title, org, mobile phone, picture, address, ID, category, join date, member type, status, paid thru date



- Contact Mini Profile
 - Display name, title, org, mobile phone, picture, address, ID, category, join date, member type, status, paid thru date
- Panel Editor/Panel Collection Editor
 - Display info about contact/org such as user-defined fields, demographic info, biography, etc.
 - Can display single- or multi-instance data



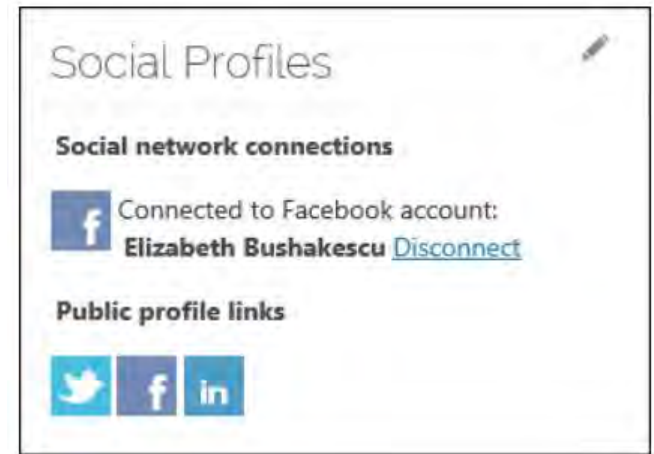


Useful iParts

- Contact Mini Profile
 - Display name, title, org, mobile phone, picture, address, ID, category, join date, member type, status, paid thru date
- Panel Editor/Panel Collection Editor
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- Group List Editor
 - Display groups the contact is a member of (Chapters, Committees, Dynamic Groups, Events, etc.)



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- Group List Editor
 - Display groups the contact is a member of (Chapters, Committees, Dynamic Groups, Events, etc.)
- Social Profile List Creator
 - Displays social icons/links to Twitter, Facebook, and/or LinkedIn





Useful iParts

- Communication Preferences Editor
 - Used on My Account page
 - Allows user to opt-in/out of communications, directory, etc.

Communication preferences

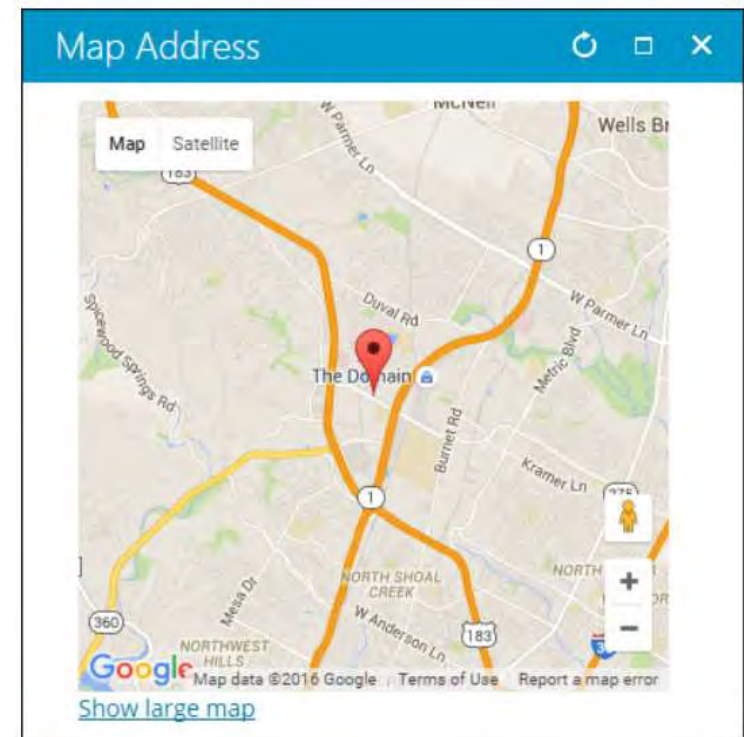
I would like to receive:

- Invitations to educational opportunities
- Promotional communications
- Monthly news
- Notices of volunteer needs

Unsubscribe from all

You may unsubscribe from these communications at any time

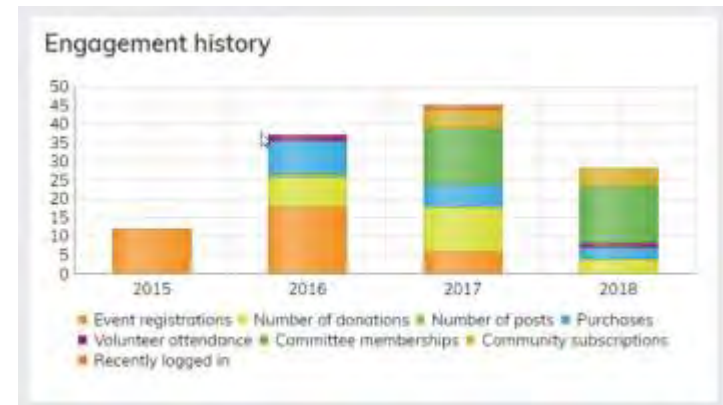
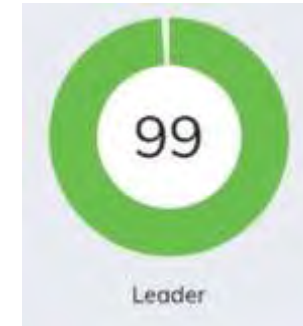
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- Address Mapper
 - Displays map of specified address from contact record





Useful iParts

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- Engagement Score
 - Displays contact engagement as score or percentile



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- Engagement Score
 - Displays contact engagement as score or percentile
- Query Menu
 - Displays a query on the page
 - Queries can be filtered to only display info about the contact whose profile is being viewed

Enter search criteria to find people

Select a query:

Last name starts with:

First name starts with:

City starts with:

State Province:

Country:

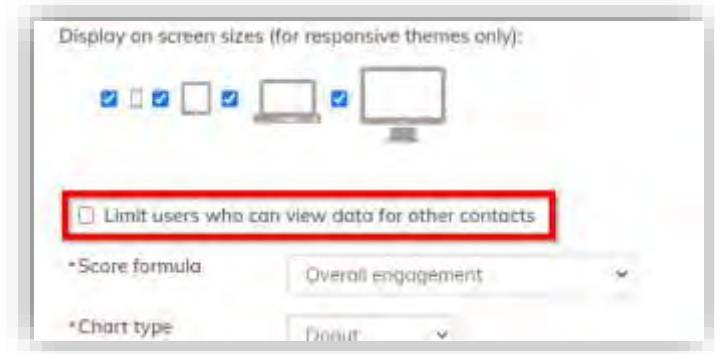
ID number:

Organization starts with:

Is Company Head:

ID	Name	Organization	Address	Phone	Email
111	Ms. Eva Tase	American Business Services	4200 Wilson Street, Cambridge, MA 02142, UNITED STATES		etase@absc.com
1111	Ms. Charity Toliver	Compass Partners	6220 Reservoir Ave, Bethesda, MD 20814, UNITED STATES		ctoliver@compass.com
11111	Mr. James F. Toliver		3401 St. Hubert Way, MD 21740-7817, UNITED STATES		jtoliver@comcast.com
111111	Mr. David W. Taylor		300 S. Grand St, Little Rock, AR 72201-2113, UNITED STATES		dtaylor@att.net
1111111	Ms. Nancy Taylor		34405 Road 182, Woodlake, CA 93286, 9011, UNITED STATES		ntaylor@att.net
11111111	Mr. John Taylor		PO Box 21799, Los Angeles, CA 90024		jtaylor@att.net

- Limit users who can view data for other contacts
 - When selected, contact data only visible to the contact themselves, or those with elevated permissions





To Share or Not To Share

- Legality/ethics of sharing data about contacts

ALL INFORMATION IS FOR INFORMATIONAL PURPOSES ONLY AND SHOULD NOT BE CONSIDERED LEGAL ADVICE ON ANY SUBJECT MATTER.



- Legality/ethics of sharing data about contacts
- Data privacy mandates
 - [General Data Protection Regulation \(GDPR\)](#)
 - [California Consumer Privacy Act \(CCPA\)](#)
 - [Health Insurance Portability and Accountability Act \(HIPAA\)](#)
 - Other applicable regulations (local, state, federal, international, etc.)

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- Legality/ethics of sharing data about contacts
- Data privacy mandates
 - General Data Protection Regulation (GDPR)
 - California Consumer Privacy Act (CCPA)
 - Health Insurance Portability and Accountability Act (HIPAA)
 - Other applicable regulations (local, state, federal, international, etc.)
- Data Sharing Notification
 - Privacy policies
 - Other methods of notifying users what data may be shared

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 - Other methods of notifying users what data may be shared
- **Allowing users to opt-in/out of data sharing**

ALL INFORMATION IS FOR INFORMATIONAL PURPOSES ONLY AND SHOULD NOT BE CONSIDERED LEGAL ADVICE ON ANY SUBJECT MATTER.

- Staff site > **Settings** > **Contacts** > **Contact Security**
 - All users access query
 - Authenticated users access query
 - Members access query



- Staff site > Settings > Contacts > Contact Security
 - All users access query
 - Authenticated users access query
 - Members access query
- Controls who will show up in site search





Key Points

- Profile VS My Account
- What is included out-of-the-box
- Making it configurable
- iParts to consider using
- To share or not to share





Questions & Answers



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