Users Guide

Customer Service Alerts Module for iMIS

an Xtender Application
Developed by

RSM: McGladrey
Customer Service Alerts
User Guide
Version 2.0

This manual is written for users. Also available are the “What’s New” document to assist with migrating from CSA version 1, and the CSA Technical Guide, to aid with installation, licensing, and the creation and modification of Alert Rules.

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Customer Service Alerts - Overview

The purpose of the Customer Service Alerts (CSA) module is to allow users to view specific information about a record in iMIS without having to access additional screens or menu options. While the iMIS Membership module is extremely robust, users often need immediate access to specific information, especially if they are engaged in action with a client or member. CSA allows an organization to display this needed information on an easy to see and use screen the user can locate wherever they like. For iMIS 10 users, we recommend placing the window in the lower left hand corner of the Task Menu.

CSA comes with default alerts that your organization can utilize immediately. However, its true power is that your IT department can configure CSA for the alerts that are most meaningful for your organization.

Activating CSA

To activate CSA, go to Xtender on your title bar and click on Customer Service Alerts.
The CSA window

Up to five Alerts are displayed at once in order of priority. More can be seen by scrolling.

Lifetime value and other messages such as “Last updated by” can be adjusted to fit your needs.

The Refresh button forces CSA to update from the database to see any changes.

The numbers on the right show you how many alerts are available and which ones you are viewing. The scroll buttons let you see any additional alerts.

Clicking the Action button will execute a command or action specific to the Alert.

Clicking the Clipboard button copies relevant information from the alert to the Windows clipboard.

Full Name Displayed

Lifetime Value: 1322
Last updated 08-21-2000 by MANAGER
Mouse Rollover

Additional information on a record can be obtained by resting your mouse on the specific alert. See below.
Clicking on the Alert

Clicking on the alert (Credit Holds) gives a specific message. The number below the message indicates the rank this alert was assigned. Click OK to clear the message.

The Clipboard button

The clipboard button allows relevant information to be copied to your clipboard. Here is the information that was copied by using the Clipboard button by the Credit Hold Alert above.

<table>
<thead>
<tr>
<th>Invoice #</th>
<th>Date</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>9</td>
<td>03/31/2000</td>
<td>20.90</td>
</tr>
</tbody>
</table>
The Action Button

Each Alert can also be associated with an Action. The Action can initiate actions to correct the Alert condition, or to print out information about the Alert.

When an Alert has an Action available, the exclamation point button will be enabled. In this picture, the Past Due Pledges and Incorrect Chapter items have Actions available.

Resting the mouse over the Action button will reveal any description of the Action that will be performed by clicking the button. This message is controlled by the author of the Alert Rule.
An Action can run any external program according to the Alert author’s instructions. For example, an Action could create an email with the body text already created, or launch a report or web page. An Action could also execute an outside helper application to pass parameters to a Crystal report, or to take some corrective actions in the SQL database, such as moving the person to the correct chapter.

Dear Chrissie:

Our records indicate that your following pledge(s) have not been received. If you have received this letter in error, please do so at your earliest convenience.

<table>
<thead>
<tr>
<th>Invoice Date</th>
<th>Due Date</th>
<th>Charges</th>
<th>Credits</th>
<th>Balance</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>02/21/2003</td>
<td>02/21/2003</td>
<td>250.00</td>
<td>0.00</td>
<td>250.00</td>
<td>Pledges Inst#1</td>
</tr>
<tr>
<td>08/30/2004</td>
<td>08/30/2004</td>
<td>2000.00</td>
<td>0.00</td>
<td>2000.00</td>
<td>Pledges Inst#1</td>
</tr>
</tbody>
</table>

If you have any questions regarding your pledge or would like to be rounded for your tardiness, please call me at 888-999-1.

Sincerely,
Sample Alerts

CSA comes with some sample alerts to demonstrate how Alert Rules can be used within the most common areas of iMIS. While some alerts may be useful without changes, you will undoubtedly benefit from tailoring the Alert Rules to fit your exact situation. Your AiSP or IT staff can modify these samples to refer to Customizer fields in your database, to use different criteria according to your practices, to change the rank and icon of each Rule, or simply as a guide to creating a new Rule from scratch.

Listed below are the sample alerts included at press time.

- pcsa_web_usage – Notify of recent web users or people who have never used the web
- pcsa_web_login_expired – Notify of recent web users or people who have an expired web login
- pcsa_web_login_disabled – Notify of recent web users or people who have a disabled web login
- pcsa_past_due_pledge – People who have Past Due Pledges
- pcsa_old_balance – Gives outstanding AR balance
- pcsa_missing_meeting – Lets you know that the record has not registered for a specific meeting.
- pcsa_member_since – Displays their join date that they have been a member since.
- pcsa_cross_sell – Cross sell products
- pcsa_committee_member – Alert to current and past board members
- pcsa_certification – Displays most recent certification
- pcsa_call_status – Notifies of the date of most recent call and the status of the call (resolved or unresolved)
- pcsa_calculate_status
- pcsa_calculate_fixed_text
- pcsa_backorder_unshipped_orders – People who have backorders or unshipped orders

CSA 2.0 works with iMIS 4.41 and above.