

# ***Users Guide***

an Xtender Application  
Developed by

**RSM! McGladrey**

*Customer  
Service Alerts  
Module  
for  
iMIS*

# 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.



**134 International Book Publishers (iMIS Business Framework)**

File Edit Cnds Utilities Xtender Help

Home | Customers | Billing | Events | Fund Raising | AR/Cash | Certification | Exposition | Exhibition

### Manage customers Company Member - International Book Publishers

ID 134 Company Member Active

**Customers**

- Manage customers
- Manage committees
- Manage chapter rosters
- View activity tasks
- Manage duplicates
- Generate reports
- Import activities
- Set up tables
- Set up module
- Set up Fund

**Mr. Robert L. Berry, In...**

- Missing data
- Credit Hold
- Web novice

Refresh 1-3

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

**Company**

ID: International Book Publishers Company Sort: INTERNATIONAL BOOK

Mr. Robert L. Berry Suffix: Suffix  
Bob Designation: President

**Address** Street Address Home Address

Address: 127 Bookbinder Road Status: Suite 256  
Fort Worth TX 75301-1516

Preferred Mail Preferred Bill Country  
Phone Fax E-mail

**Profile** Status Notes Picture Financial Interne

Work Phone (817) 876-8765  
Home Phone (817) 876-8790  
Fax (817) 423-5687  
Toll Free  
E-mail  
Web Address

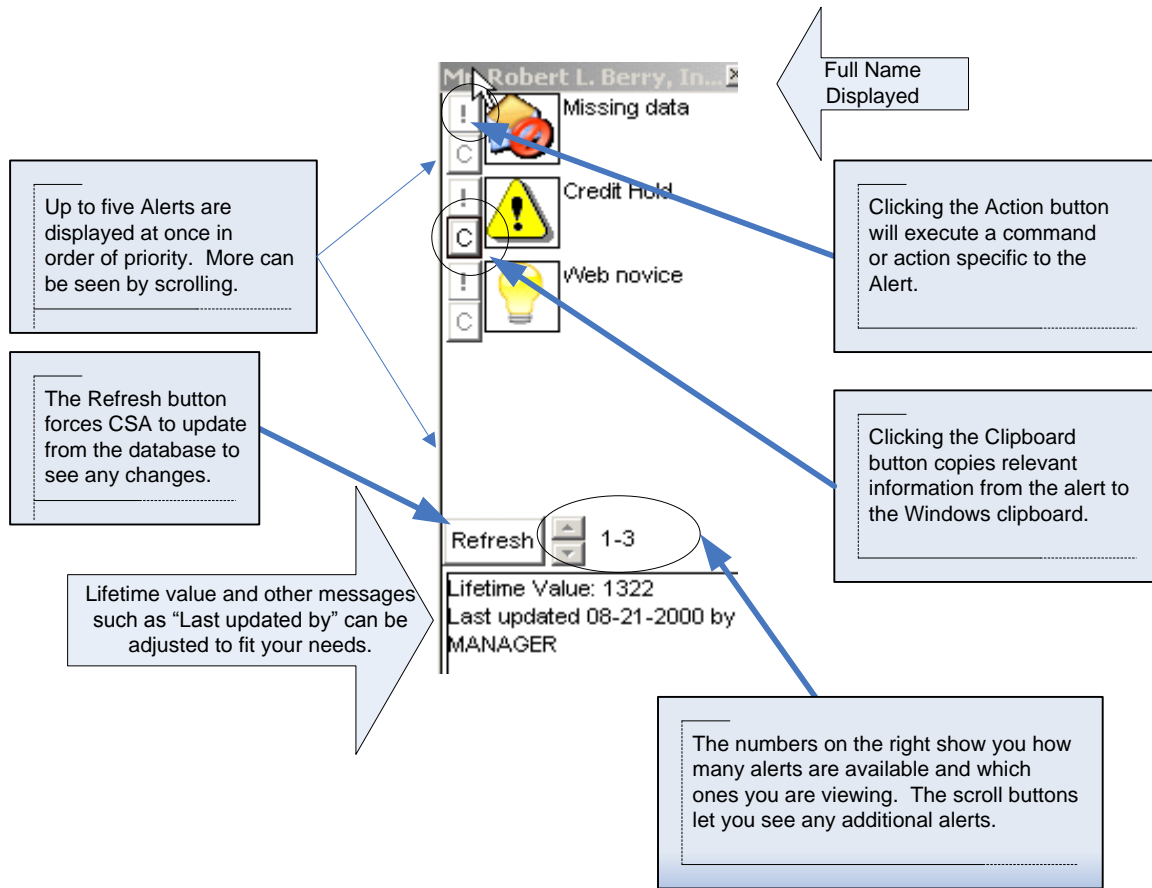
**Results** Record History Activities-All Calls Letters Roster AR/Cash Billing Events Orders Exhibition E

ID	Last Name	First Name	Middle Name	Suffix	Title	Comp
161	Bachman	Albert				Bach
156	Bachman	Peter	L.		Vice President	Amer
182	Bell	Duane	D.			Bell C
▶ 134	Berry	Robert	L.		President	Inter
123	Better	Charles	P.		Sales Manager	Softv
163	Blackwood	George				Black
121	Bondlum	James	N.		Director	Spyb
120	Boone	Teri	L.		President	Orga
164	Brown	Theodore	G.		Director Of Develop	Unive
107	Caller	Paula	D.		Controller	Acme
111	Carlin	Goerge	B.		Administrative Mana	Sailin
165	Clark	Paula				Clark
101	Clooney	George	A.	Jr.	President	Coun
158	Colbv	John	J.		Controller	Foun

New Delete Find Print 77 results returned.

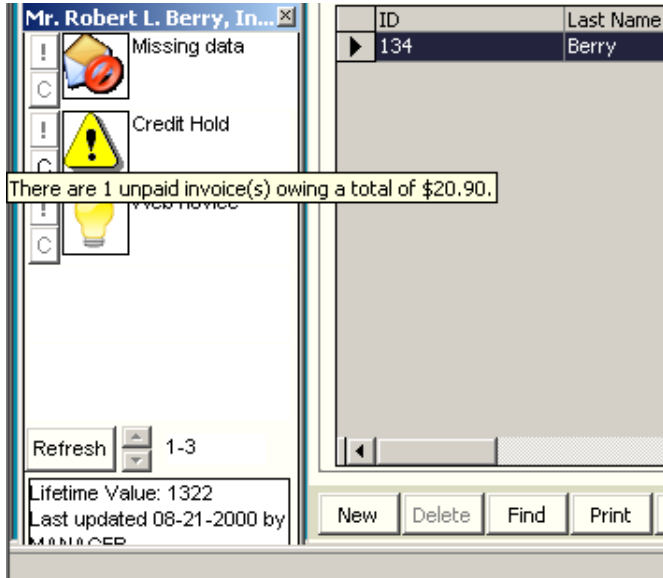
Customer Service Alerts Module

## The CSA window



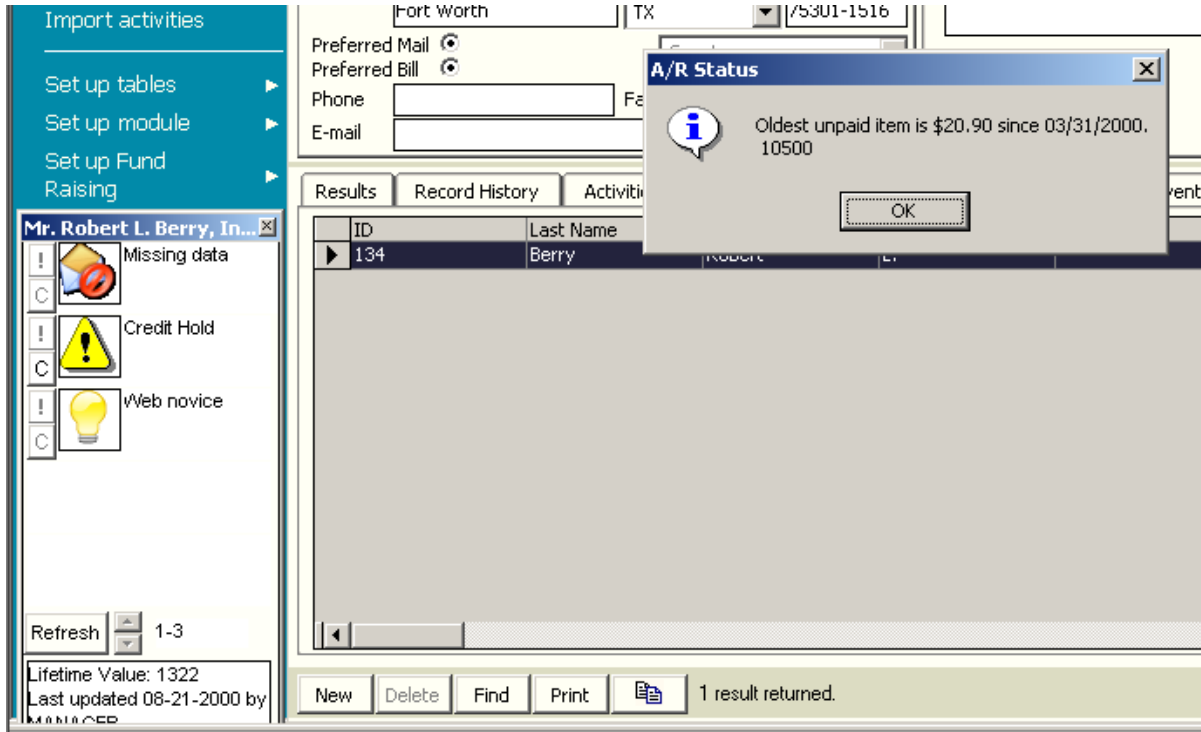
## Mouse Rollover

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

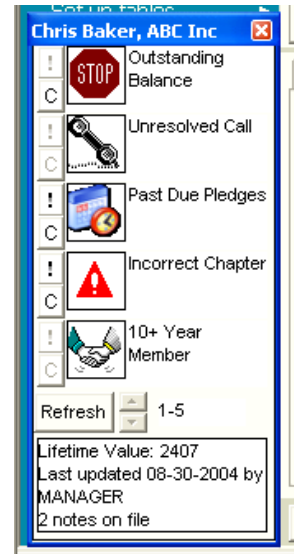
The clipboard button allows relevant information to be copied to your clipboard. Here is the information that was copied by using the Clipboard button by the Credit Hold Alert above.

Invoice #	Date	Balance
9	03/31/2000	20.90

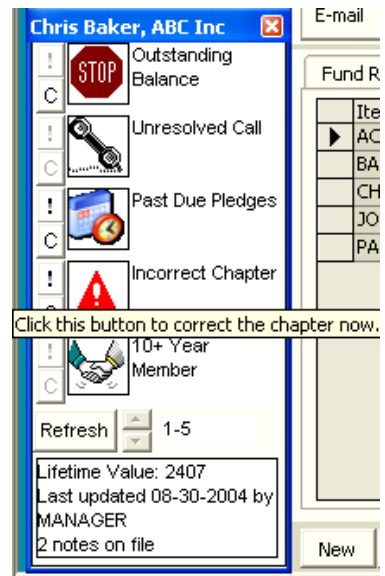
## The Action Button

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.

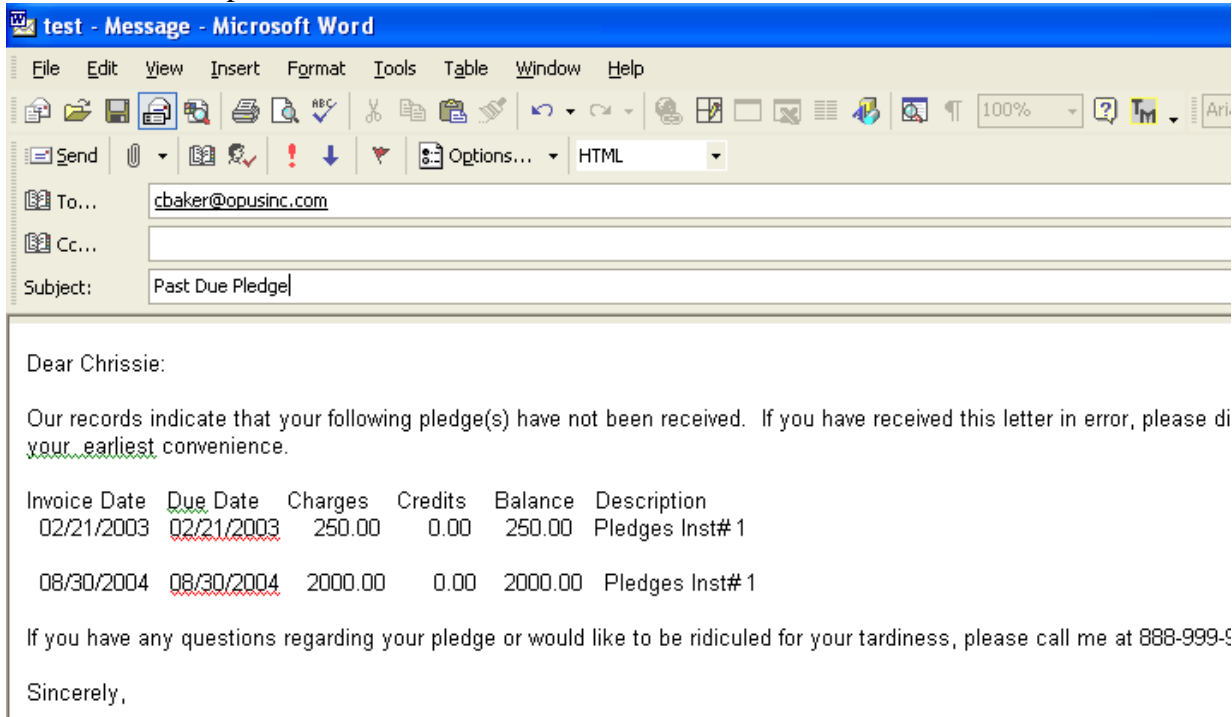


Resting the mouse over the Action button will reveal any description of the Action that will be performed by clicking the button. This message is controlled by the author of the Alert Rule.





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.



## *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.