

Activity Importer Plus & iImport

Import Activities, Name, Addresses and Demographics into *iMIS*

Activity Importer Plus - Setup

File View Options Help

Activity Type: APPOINTMNT

ID: APPOINTMNT
AWARD
BOOTH
CALL
CERTIFICAT
CERTIFY
CEU
COMMITTEE

Date: 2/28/20

Assigned To: [Dropdown]

StartTime: [Dropdown]
Duration: [Dropdown]
Reminder: [Dropdown]

Import

iMIS Business Framework (version 15.1.3.6699, server SQL2008.CSIDEMO)

iImport - Customers Mapping

File Tools Help

Customer Permanent Seasonal Business

The tabs in iImport match your *iMIS* setup.

Address [Dropdown]
Address 2 [Dropdown]
Address 3 [Dropdown]
City: Permanent City [Dropdown]
St/Prov: Permanent State [Dropdown]
Zip: Permanent ZIP [Dropdown]
Country: USA [Dropdown]
Bad Address Reason Code [Dropdown]
Is Preferred Mail [Dropdown]
Is Preferred Bill [Dropdown]
Is Preferred Ship [Dropdown]
Phone: Permanent Phone N [Dropdown]

Ready (1 record)

Activity Importer Plus imports all types of activities into *iMIS*.

- Imports unique activities into your *iMIS* database including marketing, calls, and event participation
- Generates activities from IQA queries for marketing segmentation
- Saves import templates for reuse, making recurring imports a snap
- Optionally imports gifts

iImport inserts and updates data into your *iMIS* database.

- Imports new name, address, demographic and activity records
- Updates name, address, and demographic information
- Saves templates to reuse for future imports and updates
- Uses an easy to understand interface allowing end users to perform imports and updates

Product Requirements
iMIS 10.6 or higher and iBO

Email Us:
sales@csiinc.com

Visit Us Online:
www.csiinc.com

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630.681.1100

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