



Business Systems Consultants, Inc.

A leading provider of business and software solutions for Associations. Our solutions are based on a deep knowledge of the domain that we serve, and on our proven ability to deliver the technical components of these solutions.

Serving associations and the not-for-profit community since 1987, BSCI has been an Authorized iMIS Solution Provider for over 16 years. With headquarters and training facilities located in downtown Chicago, BSCI currently supports over 50 member-based organizations throughout the Midwest using the powerful iMIS CRM system.

INTRODUCING NEW PRODUCTS FROM BSCI!!!

Professional Referral Suite includes 3 components, back office for calls, website for self-service, and mentor/mentee website.

The back office component allows service representatives to respond to calls from clients. Client information is tracked as is search criteria. The search results are displayed and the provider profile can be reviewed. Once the provider is selected a notification is sent to both parties and the information is retained in the database for future reporting. If you currently use the iMIS referral system the data is compatible and the reports will continue to work.

The self-service component allows the client to perform on-line searches and selection. Currently no information is stored concerning the search.

The mentor/mentee component allows veteran providers to sign-up as mentors. New providers can sign-up to be mentees and select a mentor.

Web Services Suite comes with 7 functions, all synchronized with the iMIS security model.

These include:

- *manager customers*
- *delete customers*
- *retrieve member profile*
- *get groups*
- *manager committees*
- *manager committee members*
- *retrieve and manage user credentials*
- *Pay Dues*
- *Purchase Products*

Billing iPart component allows the user to view and update billing data through the browser. This component works through the profile update of a member. User can view status of the dues products for the member and, if a full user with security access, can update, insert, or delete line items.

Word Merge iPart allows users to run an IQA query and merge to a Word template. The user will build a template in Word and include the merge fields. The IQA is built using the query builder tool in iMIS. Once the template and the query are selected, the merge fields are displayed for review. When the merge runs, the merged document is displayed and the user can then print the results. This component can be used with the staff view or the public view.

Open Source ETL for iMIS tool allows automating and performing various tasks in iMIS. This could include the building of data marts, exchanging data with other systems, among other useful tasks.



INTRODUCING NEW PRODUCTS FROM BSCI!!!

ALL FOR THE I15 WEB VIEWS

NEW REFERRAL TRACKING SYSTEM FOR STAFF AND PUBLIC USERS – Replaces the iMIS Referral module with an iPart and added functions/features. All current referral reports continue to work as it uses the same table structure as the current iMIS module. Also includes a public view finder for the website.

NEW MENTOR/MENTEE TRACKING SYSTEM – allows members to sign up as mentors and new members to find a mentor

ADDITIONAL DESKTOP FUNCTIONALITY IN THE BROWSER

BILLING VIEW/UPDATE – allows a review of the dues items in the browser by full or casual users. Allows full edit of dues items by full users only.

Individual Billing	Individual Billing																																																								
<p>Instructions here.. Add</p> <table border="1"> <thead> <tr> <th>Edit</th> <th>Delete</th> <th>Fee Product</th> <th>Bill Date</th> <th>Paid Through</th> <th>Balance</th> <th>Payment Amount</th> <th>Complimentary</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td>MDR</td> <td>5/11/2011</td> <td></td> <td>\$320.00</td> <td>\$0.00</td> <td><input type="checkbox"/></td> </tr> <tr> <td></td> <td></td> <td>SR-EC</td> <td>5/11/2011</td> <td>6/30/2011</td> <td>\$0.00</td> <td>\$0.00</td> <td><input type="checkbox"/></td> </tr> <tr> <td></td> <td></td> <td>BI</td> <td>5/11/2011</td> <td>6/30/2011</td> <td>\$0.00</td> <td>\$0.00</td> <td><input type="checkbox"/></td> </tr> <tr> <td></td> <td></td> <td>REFERRAL</td> <td></td> <td>3/31/2009</td> <td>\$0.00</td> <td>\$0.00</td> <td><input type="checkbox"/></td> </tr> <tr> <td></td> <td></td> <td>BAFFOUND</td> <td></td> <td></td> <td>\$0.00</td> <td>\$0.00</td> <td><input type="checkbox"/></td> </tr> <tr> <td></td> <td></td> <td>LATTYPAC</td> <td></td> <td></td> <td>\$0.00</td> <td>\$0.00</td> <td><input type="checkbox"/></td> </tr> </tbody> </table>	Edit	Delete	Fee Product	Bill Date	Paid Through	Balance	Payment Amount	Complimentary			MDR	5/11/2011		\$320.00	\$0.00	<input type="checkbox"/>			SR-EC	5/11/2011	6/30/2011	\$0.00	\$0.00	<input type="checkbox"/>			BI	5/11/2011	6/30/2011	\$0.00	\$0.00	<input type="checkbox"/>			REFERRAL		3/31/2009	\$0.00	\$0.00	<input type="checkbox"/>			BAFFOUND			\$0.00	\$0.00	<input type="checkbox"/>			LATTYPAC			\$0.00	\$0.00	<input type="checkbox"/>	<p>Instructions here..</p> <p>Individual Billing</p> <p>Bill Amount: <input type="text" value="220.00"/></p> <p>Bill Date: <input type="text" value="5/11/2011"/></p> <p>Bill To Id: <input type="text"/></p> <p>Complimentary: <input type="checkbox"/></p> <p>Paid Through: <input type="text"/></p> <p>Source Code: <input type="text" value="Select"/></p> <p>Status: <input type="text" value="A"/></p>
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Selected Document: SampleMemberMergeLetter.docx: ver: v10 (MS Word 2007) Reset Form

Selected IQA: Helper: Word Merge, Membership

Merge Details

IQA Columns Found	Word Merge Fields Found	Merge Fields Matched
Address1 Address2 Address3 City Company Email Fullname ID Informal Lastname Prefix State Title Zip	Address1 Address2 Address3 City Fullname Lastname Prefix State Zip	Address1 Address2 Address3 City Fullname Lastname Prefix State Zip

IQA Record Count: 82

Merge to Document Merge

Matthew E. Cohn
123 N. Wacker Dr.
Ste. 1800
Chicago, IL, 60601

September 29, 2011

Take a few moments to discover how your membership can work for you RIGHT NOW.

Dear Mr. Cohn,

Because you are a member of Our Organization, you can use all of the benefit programs offered through Our Organization and start saving money—right now. Let me tell you how. As a member, you are eligible for a full range of valuable, money-saving benefits that are available to members only.

COMMITTEE VIEW/UPDATE – allows members to be added or deleted from a committee in the browser.

WORD MERGE USING IQA AS INPUT – brings the word merge capability to the browser. Can be used by all users (full, casual, public). First select the template then the IQA for merge. Opens the document for review before printing. Works with word 2007 and up.

(sample output) Current options for the merge include removing fields when there is not data and displaying the first 5 records for review.