



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 140 integrations
- Over 100 RiSE website implementations
- iMIS EMS upgrade specialists supporting dozens of iMIS EMS clients





Presenter:

Michelle Clemovich, CiP, COWA

Lead iMIS Consultant

Association Technology Solutions, LLC

Email: mclemovich@atsol.org



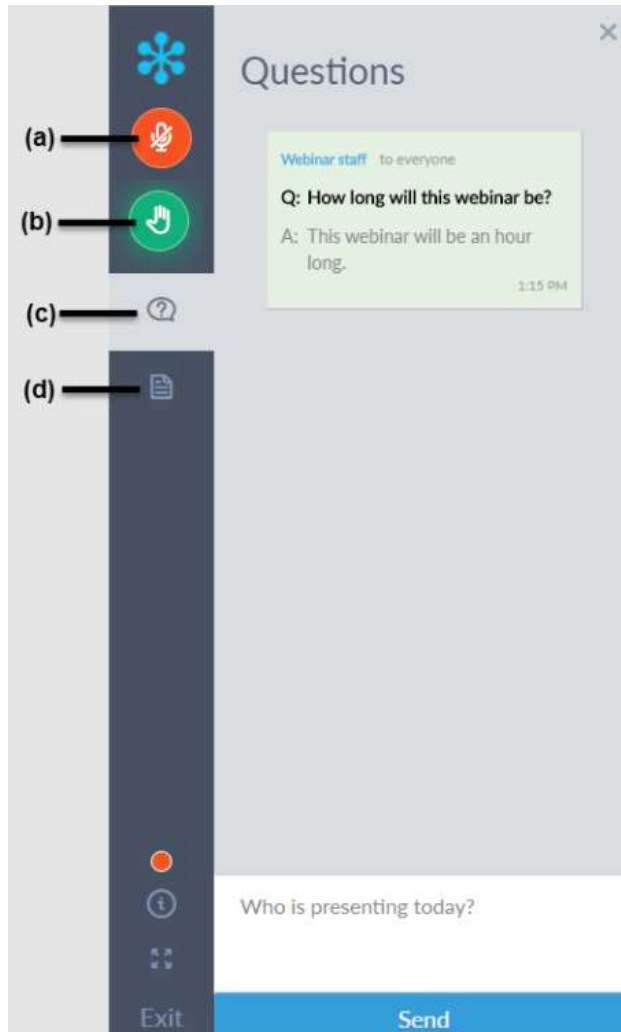
Moderator:

Richard Banks

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



Upgrade to EMS



Direct Upgrade

- ASI Hosting Azure
- Automatic Updates
- Security, Disaster Recovery, & PCI Validation

20/20 Advance Program

- ASI Hosting Azure
- **Periodic Updates**
- Security, Disaster Recovery, & PCI Validation

Self-Hosted

- Client Preference
- Client Responsible for Updates and Support
- **Access to SQL**

Have AiSP run the
ASI customization
scripts

HELP!

Remove all
customizations!!!



New Tool from ASI

Upgrade Dashboard





Upgrade Dashboard

Items requiring attention prior to upgrade

Commerce Membership Events Contacts Other

Select a query (Commerce) Products not currently configured to Show On Web Export

If a SALES product is not configured to Show On Web, then it will not be available to sell post-upgrade. To ensure all products that you wish to sell are available post-upgrade, update the Show On Web option. All products returned in this query are not configured with Show On Web. Update these products if you wish to sell these via a public website.

Page: 1 of 2 Go Page size: 20 Change Item 1 to 20 of 21

[Show all 21](#)

Title	Product Code	Product Type	Sell On Web	Product Category
Bad Debt Expense	BADDEBT	SALES		
Personalized Desktop Calendar: Black	FR007	SALES		GIFTS
Thermal Travel Mug with Logo	FR008	SALES		GIFTS
Thermal Travel Mug: Green	FR009	SALES		GIFTS





Dashboard Categories



COMMERCE



MEMBERSHIP



EVENTS



CONTACTS



OTHER



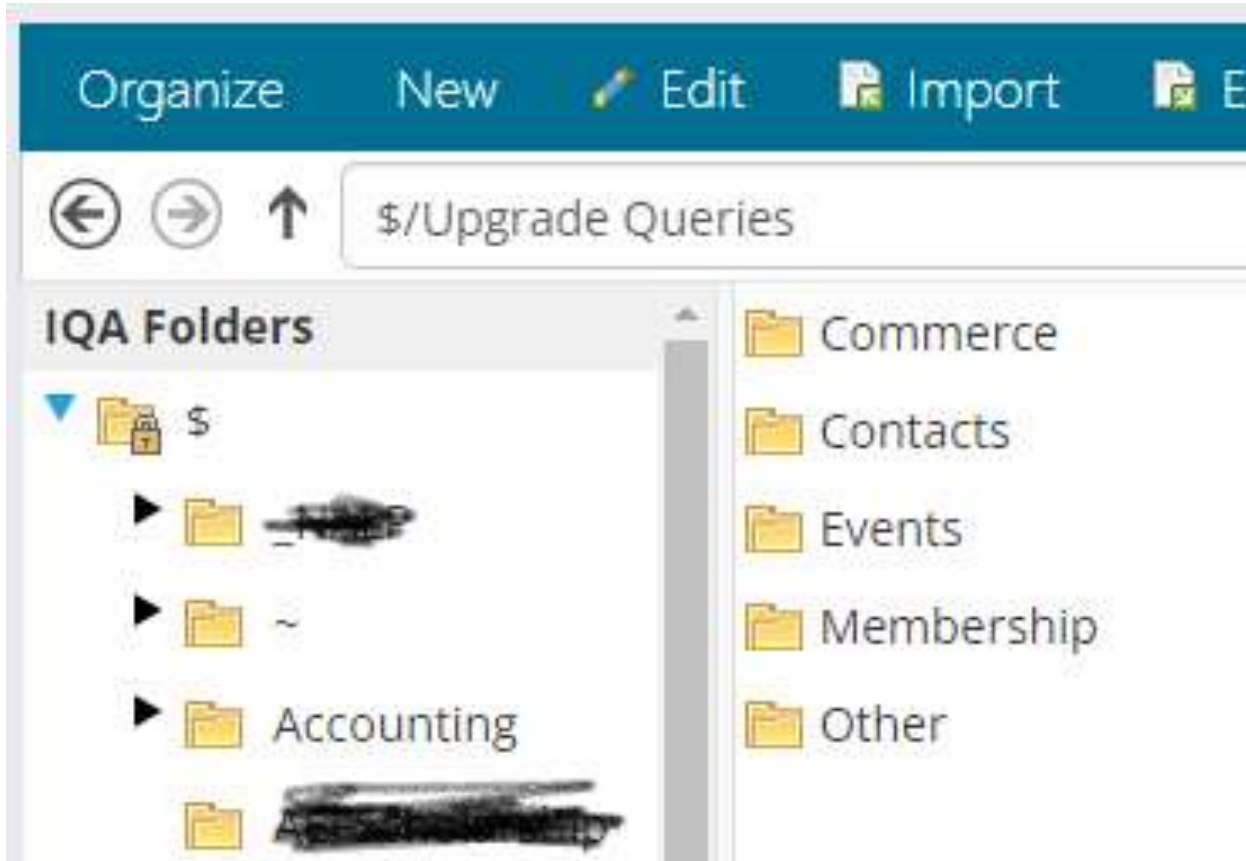
Member Type/Category combinations

Subscriptions

Confirm Member_Record and Company record are populated correctly



Add your own IQAs





iMIS Engagement Management System Documentation

The official source for help articles, quick tutorial videos, and latest new feature updates.

https://help.imis.com/enterprise/upgrading_to_imis_ems/upgrade_dashboard.htm



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