

# Practical Process Automation for Staff: Scheduled Tasks

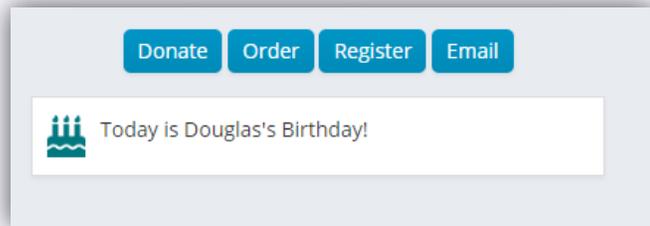
Presented by: Angela Nimer



# What is Process Automation?

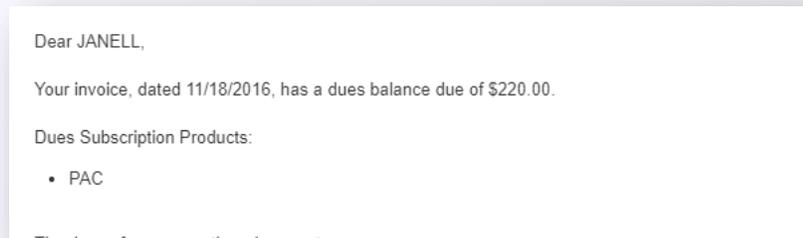
## Alerts

- Placed on Content Pages
- Examples:
  - Owe dues
  - Missing phone number
  - New donor club achieved



## Scheduled Task

- Perform a routine action
- Examples:
  - Email new member
  - Send a report to staff
  - Update database value based on a member activity



**NOTE: Process Automation PLUS module must be purchased to create new tasks!**



# What do I need to know to get started?

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## When?

- Scheduled vs. Database Change
- Frequency: one time, daily, weekly, monthly (hourly can be made using daily)
- Time of day (consider time to run and app pool recycles)

## Who?

- To, CC, BCC recipients if emailing or sending a report
- Who data should be updated for if stored procedure
- Keep in mind task frequency!

## What?

- Email: consider format, images, additional lists of data to appear within the email
- SSRS report to be sent
- Stored Procedure to be ran

**NOTE: A process automation task can do more than one thing – it can have more than one trigger, action, data source.**



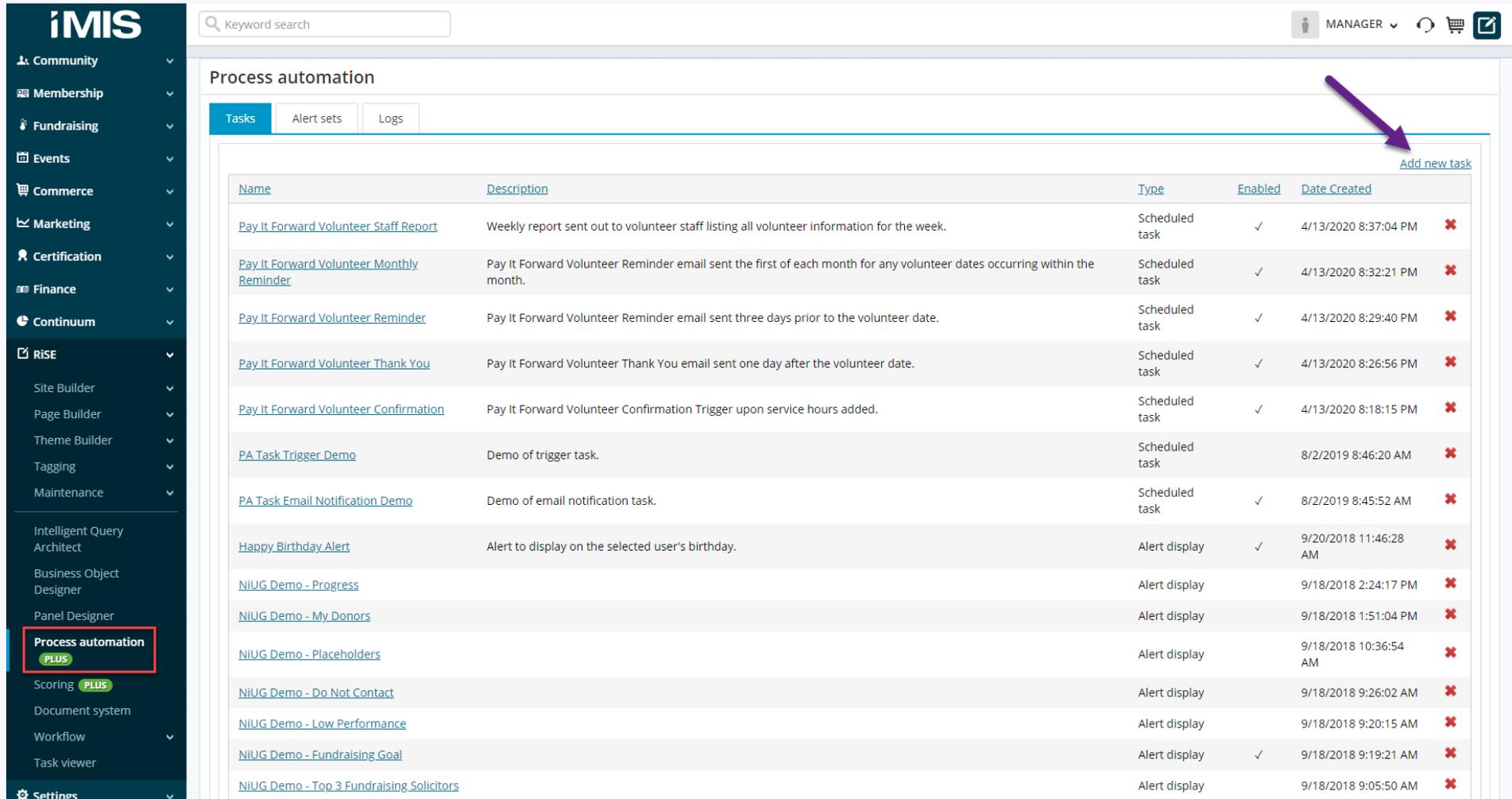
# Sample Process Automation Task Template

Process Automation Task TEMPLATE											
Status	Name of Alert	Schedule	Qualifier(s)	Who should be emailed	Email Table (if email requires table with activity details, what)	Letter Body	Email From	Email To	Email CC	Email BCC	Email Subject Line
Example	New AFP	Nightly, 1 AM	Member type='UG' Transaction	Member CPVPFAACCHAACFA	Member Name Effective Date Current Balance	See Email Step tab	email@example.org	Member CPVPACCHAACF	Department@exam		Notification of Member AFP Status

Process Automation Task TEMPLATE	
Email Body	Special Notes
<p>Attention Member:</p> <p>The Fraternity's records indicate that you were placed on AFP yesterday.</p> <p>{Table}</p> <p>For additional clarification on the AFP process, please visit: <a href="http://www.example.org/fees">www.example.org/fees</a>. Any questions regarding this information should be sent to <a href="mailto:memberdepartment@example.org">memberdepartment@example.org</a>.</p> <p>Thank you,</p> <p>Member Department</p> <p>cc: AAC Financial Advisor AAC Chairman</p>	<p>Please add hyperlinks to:</p> <p><a href="http://www.example.org/fees">www.example.org/fees</a> <a href="mailto:memberdepartment@example.org">memberdepartment@example.org</a></p>



# Where do PA Tasks live in iMIS?



The screenshot displays the iMIS interface with a sidebar on the left and a main content area. The sidebar includes categories like Community, Membership, Fundraising, Events, Commerce, Marketing, Certification, Finance, Continuum, and RiSE. Under RiSE, 'Process automation' is highlighted with a red box and a 'PLUS' indicator. The main content area is titled 'Process automation' and has tabs for 'Tasks', 'Alert sets', and 'Logs'. A purple arrow points to the 'Add new task' link in the top right corner of the task list. The task list table contains the following data:

Name	Description	Type	Enabled	Date Created	
<a href="#">Pay It Forward Volunteer Staff Report</a>	Weekly report sent out to volunteer staff listing all volunteer information for the week.	Scheduled task	✓	4/13/2020 8:37:04 PM	✗
<a href="#">Pay It Forward Volunteer Monthly Reminder</a>	Pay It Forward Volunteer Reminder email sent the first of each month for any volunteer dates occurring within the month.	Scheduled task	✓	4/13/2020 8:32:21 PM	✗
<a href="#">Pay It Forward Volunteer Reminder</a>	Pay It Forward Volunteer Reminder email sent three days prior to the volunteer date.	Scheduled task	✓	4/13/2020 8:29:40 PM	✗
<a href="#">Pay It Forward Volunteer Thank You</a>	Pay It Forward Volunteer Thank You email sent one day after the volunteer date.	Scheduled task	✓	4/13/2020 8:26:56 PM	✗
<a href="#">Pay It Forward Volunteer Confirmation</a>	Pay It Forward Volunteer Confirmation Trigger upon service hours added.	Scheduled task	✓	4/13/2020 8:18:15 PM	✗
<a href="#">PA Task Trigger Demo</a>	Demo of trigger task.	Scheduled task		8/2/2019 8:46:20 AM	✗
<a href="#">PA Task Email Notification Demo</a>	Demo of email notification task.	Scheduled task	✓	8/2/2019 8:45:52 AM	✗
<a href="#">Happy Birthday Alert</a>	Alert to display on the selected user's birthday.	Alert display	✓	9/20/2018 11:46:28 AM	✗
<a href="#">NIUG Demo - Progress</a>		Alert display		9/18/2018 2:24:17 PM	✗
<a href="#">NIUG Demo - My Donors</a>		Alert display		9/18/2018 1:51:04 PM	✗
<a href="#">NIUG Demo - Placeholders</a>		Alert display		9/18/2018 10:36:54 AM	✗
<a href="#">NIUG Demo - Do Not Contact</a>		Alert display		9/18/2018 9:26:02 AM	✗
<a href="#">NIUG Demo - Low Performance</a>		Alert display		9/18/2018 9:20:15 AM	✗
<a href="#">NIUG Demo - Fundraising Goal</a>		Alert display	✓	9/18/2018 9:19:21 AM	✗
<a href="#">NIUG Demo - Top 3 Fundraising Solicitors</a>		Alert display		9/18/2018 9:05:50 AM	✗



# Give Your Task a Name

- Fill in a name and description for your task so that others will know what your task does
- Make sure to enable your task once you have done your tests and are ready for it to run

Task

## Pay It Forward Volunteer Thank You

Enabled

**Name**

**Description**

Type Scheduled task Run task now

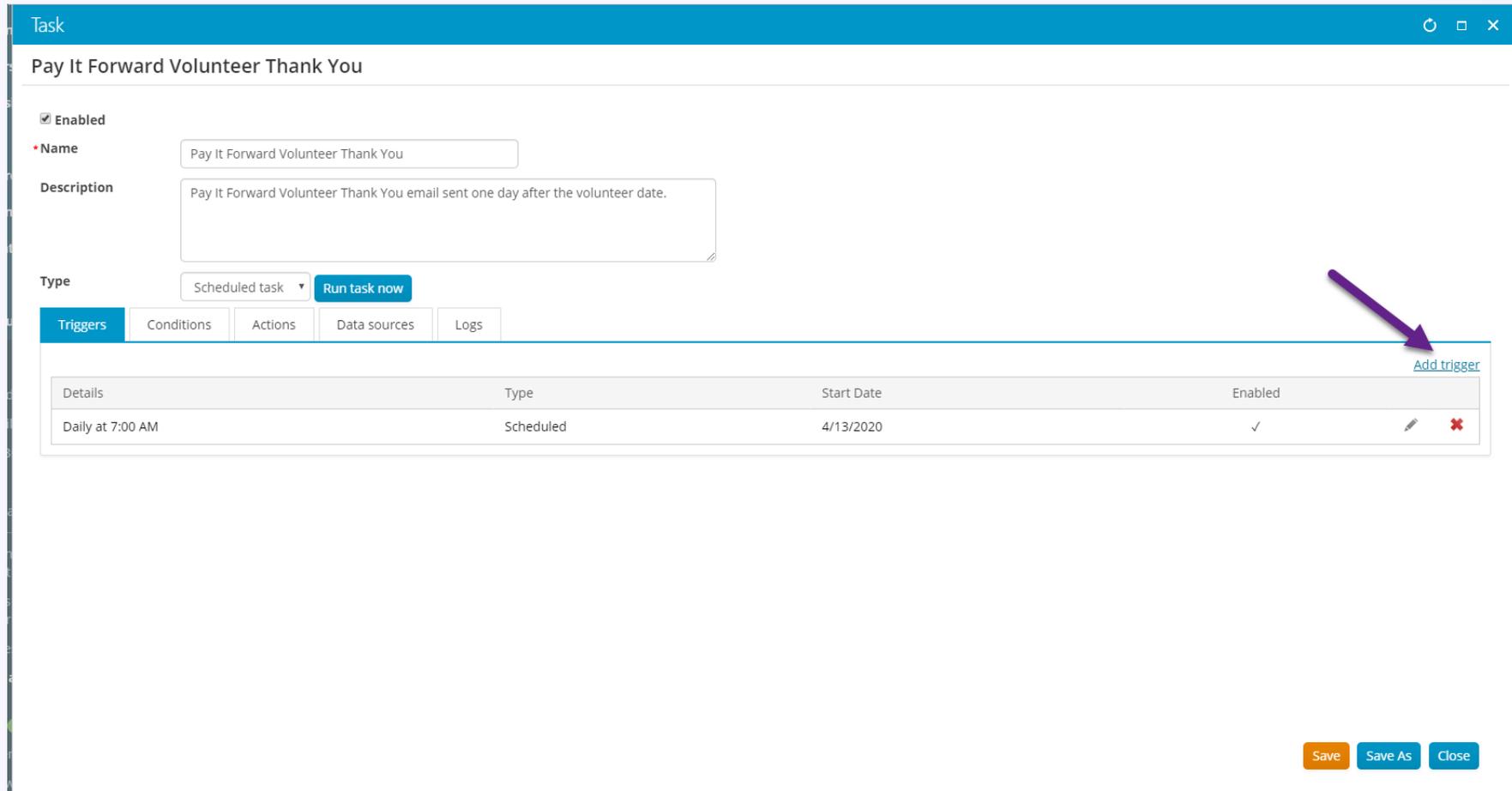
Triggers Conditions Actions Data sources Logs

Details	Type	Start Date	Enabled
Daily at 7:00 AM	Scheduled	4/13/2020	✓



# When? – Triggers Tab

- Add trigger to fill in when and how often the task should run



Task

Pay It Forward Volunteer Thank You

Enabled

\*Name

Description

Type

Triggers | Conditions | Actions | Data sources | Logs

[Add trigger](#)

Details	Type	Start Date	Enabled	
Daily at 7:00 AM	Scheduled	4/13/2020	✓	<input type="button" value="edit"/> <input type="button" value="delete"/>



# When? – On a schedule

**Edit Trigger**

Enabled

Type

On a schedule

On database change

Frequency

Daily ⓘ

Schedule

Run every 1 day(s) at: 7:00 AM ⌚ Central Daylight Time

Start

4/13/2020 📅

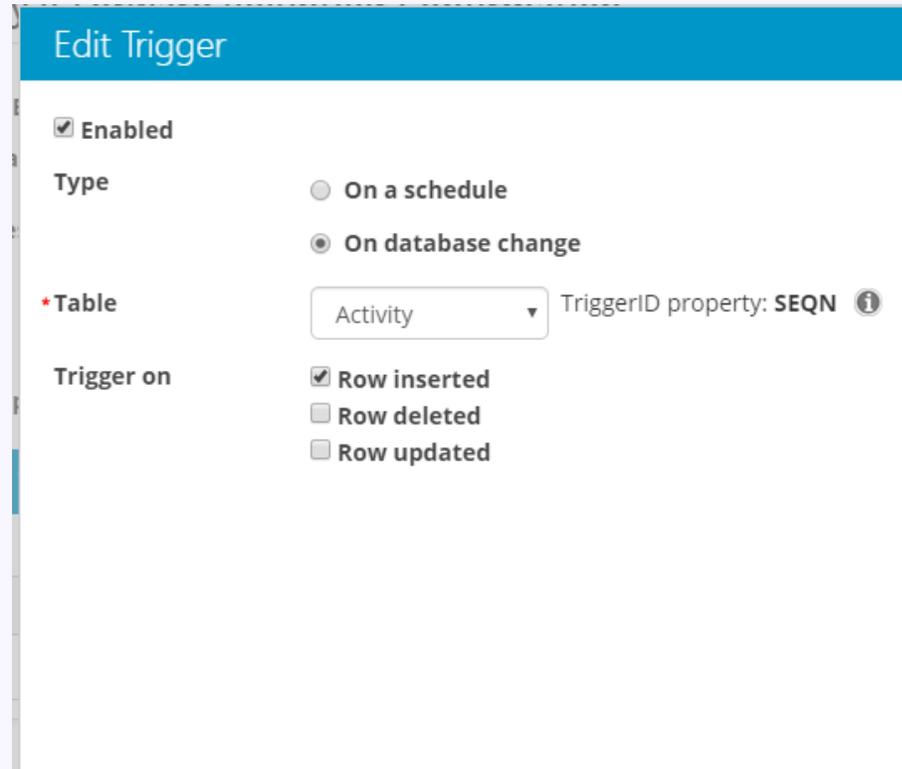
End

📅

- Fill in frequency, schedule days & times, and date the task should start
- End date can be left blank if indefinite
- Hourly tasks can be done by adding multiple daily triggers, one for each hour of the day
- Keep in mind time zone
- Make sure to enable your trigger once you have completed your testing and are ready for the task to run



# When? – On a database change



**Edit Trigger**

Enabled

Type

On a schedule

On database change

\*Table  TriggerID property: SEQN ⓘ

Trigger on

Row inserted

Row deleted

Row updated

**WARNING: Triggers on a database change can impact performance!**

- Select the table to watch for a value change
- Indicate if the trigger should happen upon insert of a new row into the table, update of a specific column in the table, or deletion of a row in the table
- Make sure to enable your trigger once you have completed your testing and are ready for the task to run



# Who? – Data sources Tab

- Add data source to determine who the action should be performed on

The screenshot shows a web application window titled 'Task' with a sub-header 'Pay It Forward Volunteer Thank You'. The interface includes a 'Task' header bar with window controls. Below the header, there are several configuration fields: a checked 'Enabled' checkbox, a 'Name' field containing 'Pay It Forward Volunteer Thank You', and a 'Description' field containing 'Pay It Forward Volunteer Thank You email sent one day after the volunteer date.'. The 'Type' is set to 'Scheduled task' with a 'Run task now' button. Below these fields are tabs for 'Triggers', 'Conditions', 'Actions', 'Data sources', and 'Logs'. The 'Data sources' tab is active, showing a table with one entry: 'PayItForwardVolunteerThankYou' of type 'IQA Query'. A purple arrow points to an 'Add data source' link in the top right corner of the table area.

Task

Pay It Forward Volunteer Thank You

Enabled

\*Name

Description

Type

Triggers Conditions Actions **Data sources** Logs

[Add data source](#)

Data Source	Type	
PayItForwardVolunteerThankYou	IQA Query	



# Who? – Select Your IQA

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### Edit Data Source

\* **Data source name**

\* **Query**  [select](#)  
[Edit source query.](#)  
[Create source query.](#)

- **Select Your IQA**
- **Give your data source a name**
- **Data source names should NOT contain spaces**



# Process Automation IQA Tips

- Make sure your filter takes into consideration the task frequency or recipients will receive emails more than you might like!
- Use a date with within days = 1 AND less than today's date to filter by "Yesterday". The "AND" filter is important!

Intelligent Query Architect

PayItForwardVolunteerThankYou

Define Run Report Group Security

Summary Sources **Filters** Display Sorting

Add Filter Refresh

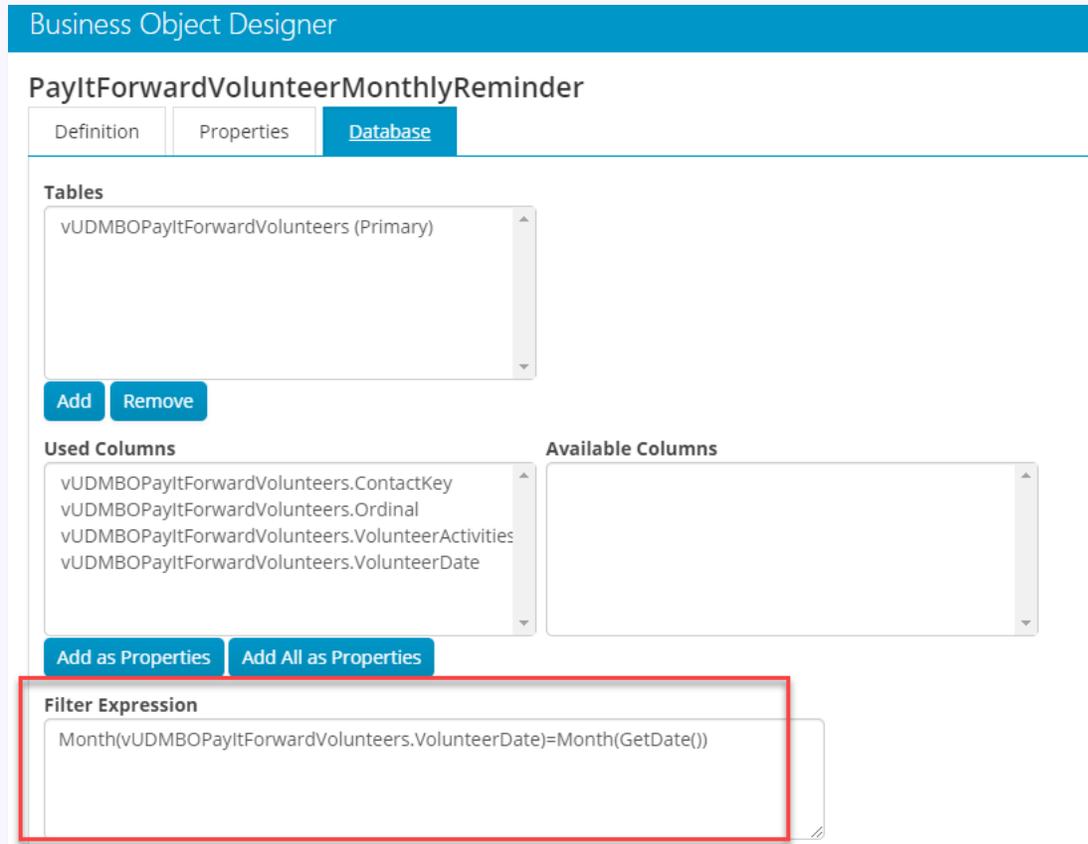
Where	Property	Function	Comparison	Multiple	Value	Prompt		
	PayItForwardVolunteers.VolunteerDate	None	Within Days		1	No		✕
And	Property	Function	Comparison	Multiple	Value	Prompt		
	PayItForwardVolunteers.VolunteerDate	None	Less		@date  Run	No		✕

Query options

- Require user to provide at least one valid value
- Limit the number of results returned



# Process Automation IQA Tips - continued



Business Object Designer

PayItForwardVolunteerMonthlyReminder

Definition Properties Database

Tables

vUDMBOPayItForwardVolunteers (Primary)

Add Remove

Used Columns

vUDMBOPayItForwardVolunteers.ContactKey  
vUDMBOPayItForwardVolunteers.Ordinal  
vUDMBOPayItForwardVolunteers.VolunteerActivities  
vUDMBOPayItForwardVolunteers.VolunteerDate

Available Columns

Add as Properties Add All as Properties

Filter Expression

Month(vUDMBOPayItForwardVolunteers.VolunteerDate)=Month(GetDate())

- You cannot use SQL functions in the filter area of IQA's so create a Business Object and use the Filter Expression there instead!



# Process Automation IQA Tips - continued

- If your trigger is on a database change, be sure to include a filter in your IQA filtering by @TriggerID
- The column to filter by must match the column noted in the task trigger screen

Intelligent Query Architect

PayItForwardVolunteerConfirmation

Define Run Report Group Security

Summary Sources **Filters** Display Sorting

Where	Property	Function	Comparison	Multiple	Value	Prompt
	CsActivityBasic.Activity Type	None	Equal	<input type="checkbox"/>	VOLUNTEER	No
	CsActivityBasic.Category	None	Equal		PAYITFORWARD	No
	CsActivityBasic.Sequence	None	Equal		@TriggerID	No

Query options

- Require user to provide at least one valid value
- Limit the number of results returned

Edit Trigger

Enabled

Type

- On a schedule
- On database change

Table

Activity TriggerID property: SEQN

Trigger on

- Row inserted
- Row deleted
- Row updated



# When? – Conditions Tab

- Add conditional data source if you don't want the actions to run if your conditional data source returns no results
- Conditional data sources are optional

The screenshot displays the 'Task' configuration window for 'Pay It Forward Volunteer Thank You'. The 'Conditions' tab is active, showing a table with one data source: 'PayItForwardVolunteerThankYou'. A purple arrow points to the 'Add data source' link in the table. An 'Add Data Source' dialog is open, showing two options: 'Use existing data source' (selected) with a dropdown menu showing 'PayItForwardVolunteerThankYou', and 'Use results of IQA query as data source'.

Task

Pay It Forward Volunteer Thank You

Enabled

Name: Pay It Forward Volunteer Thank You

Description: Pay It Forward Volunteer Thank You email sent one day after the volunteer date.

Type: Scheduled task Run task now

Triggers **Conditions** Actions Data sources Logs

You can add a data source as a condition to restrict the task to run only if the

Data Source
PayItForwardVolunteerThankYou

[Add data source](#)

**Add Data Source**

Use existing data source: PayItForwardVolunteerThankYou

Use results of IQA query as data source



# What? – Actions Tab

- Add the action you want the task to perform

The screenshot shows a web application window titled 'Task' with a blue header bar. The main content area is titled 'Pay It Forward Volunteer Thank You'. It features a form with the following fields:

- Enabled:** A checked checkbox.
- Name:** A text input field containing 'Pay It Forward Volunteer Thank You'.
- Description:** A text area containing 'Pay It Forward Volunteer Thank You email sent one day after the volunteer date.'
- Type:** A dropdown menu set to 'Scheduled task' and a 'Run task now' button.

Below the form is a tabbed interface with five tabs: 'Triggers', 'Conditions', 'Actions', 'Data sources', and 'Logs'. The 'Actions' tab is selected and highlighted in blue. Underneath the tabs is a table with the following content:

Type	Details	
Send a communication	PayItForwardVolunteerThankYou	 

In the bottom right corner of the 'Actions' tab area, there is a blue link labeled 'Add action'. A purple arrow points to this link.



# What? – Send a communication

---

- Select the task data source the email should use
- The data source selected here overrides the recipient data source selected in the communication template itself
- Select the communication template to use

### Edit Action

Type	<input type="text" value="Send a communication"/>
Recipient data source	<input type="text" value="PayItForwardVolunteerThankYou"/> <a href="#">Add new data source</a>
+ Communication	<a href="#">PayItForwardVolunteerThankYou</a> <a href="#">Remove</a>

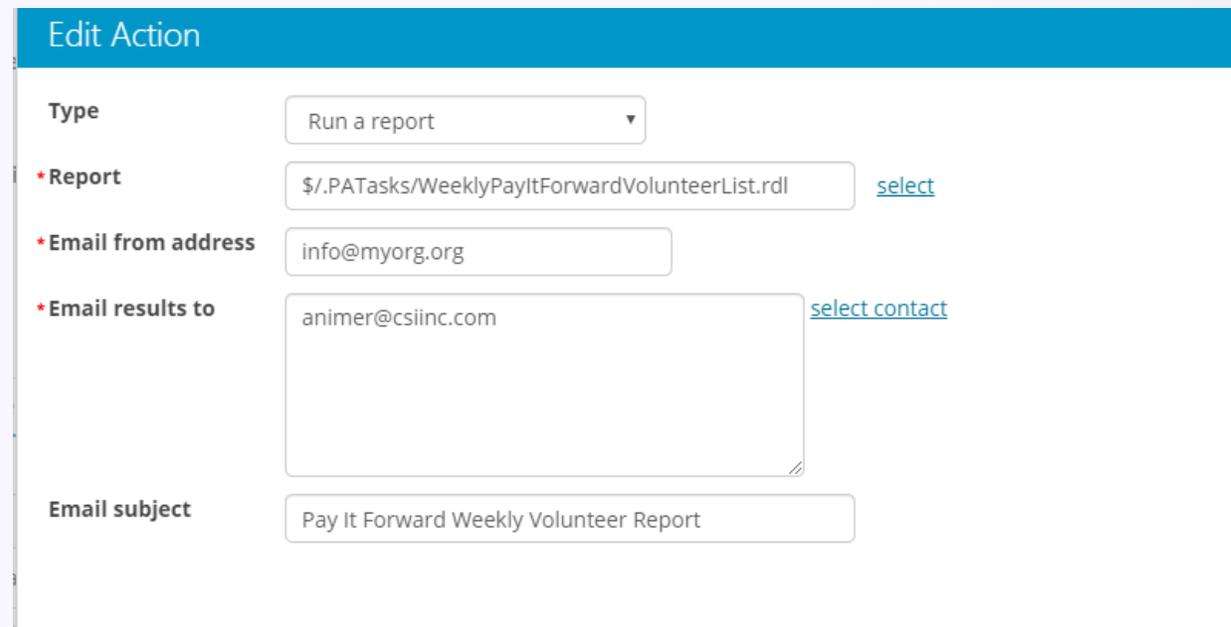


# What? – Run a report

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- Select the SSRS .RDL report to send
- Enter from, to, and subject information for the report email to be sent'
- If you want to be able to specify a body message or have a custom report per recipient, then use send communication instead with report attachment

**NOTE: Run a report actions do not require a data source to be added to the task.**



The screenshot shows the 'Edit Action' configuration window for a report task. The window has a blue header with the text 'Edit Action'. Below the header, there are several fields for configuration:

- Type:** A dropdown menu with 'Run a report' selected.
- \* Report:** A text box containing '\$/.PATasks/WeeklyPayItForwardVolunteerList.rdl' with a 'select' link to its right.
- \* Email from address:** A text box containing 'info@myorg.org'.
- \* Email results to:** A text box containing 'animer@csiinc.com' with a 'select contact' link to its right.
- Email subject:** A text box containing 'Pay It Forward Weekly Volunteer Report'.



# What? – Run a stored procedure

- Enter Stored Procedure to be ran
- Enable parameters if parameters are to be sent to the stored procedure

Edit Action

Type

\* Stored procedure name

Enable TriggerIDs as parameters TriggerID parameter: SEQN   
Data type: int

```
DECLARE @LAST_SEQN_VALUE int;
DECLARE @CURRENT_DATE date=getdate();

--Insert Into Activity (SEQN, ID, ACTIVITY_TYPE, TRANSACTION_DATE, EFFECTIVE_DATE, NOTE)
SELECT
    SEQN = row_number() over (order by a.ID),
    ID = a.ID,
    ACTIVITY_TYPE = 'SERV_HERO',
    TRANSACTION_DATE = convert(date,@CURRENT_DATE),
    EFFECTIVE_DATE = convert(date,@CURRENT_DATE),
    NOTE = 'script'

-- Step #1: create a temp table
INTO #Activity
FROM Activity a
WHERE a.SEQN = @TriggerID
    AND (SELECT SUM(a3.UNITS) as TOTAL_HOURS
        FROM Activity a3
        WHERE a3.ID = a.ID
            AND a3.ACTIVITY_TYPE = 'VOLUNTEER'
            AND a3.CATEGORY = 'PAYITFORWARD') > 30
    AND NOT EXISTS (SELECT 1 FROM Activity a2 WHERE ACTIVITY_TYPE = 'SERV_HERO' AND a2.ID=a.ID)

-- Step #2: update the Counter table
-- i.e. grab the current LAST_VALUE and at the same time increment it by the number of rows in
UPDATE Counter
SET LAST_VALUE = LAST_VALUE + (select count(*) from #Activity), -- that's the increment/upd
    @LAST_SEQN_VALUE = LAST_VALUE, -- that's the current last
    LAST UPDATED = getdate(),
```



# Communication Template Tips

- It is recommended to only have the TO go to one recipient at a time (not a list) as iMIS records the interaction based on the iMIS ID (CC and BCC interaction records do not get written)
- CC and BCC have some known bugs when using data placeholders instead of static values (you can repeat rows in your recipient data source for CC/BCC to get around this issue)
- The party additional data source automatically gets created with communication templates and ties to your recipient data source via the iMIS ID and pulls recipient Name table data
- Your recipient data source MUST contain an iMIS ID

Communication templates

PayItForwardVolunteerReminderMonthly – Compose communication

From

To

[Cc](#) [Bcc](#)

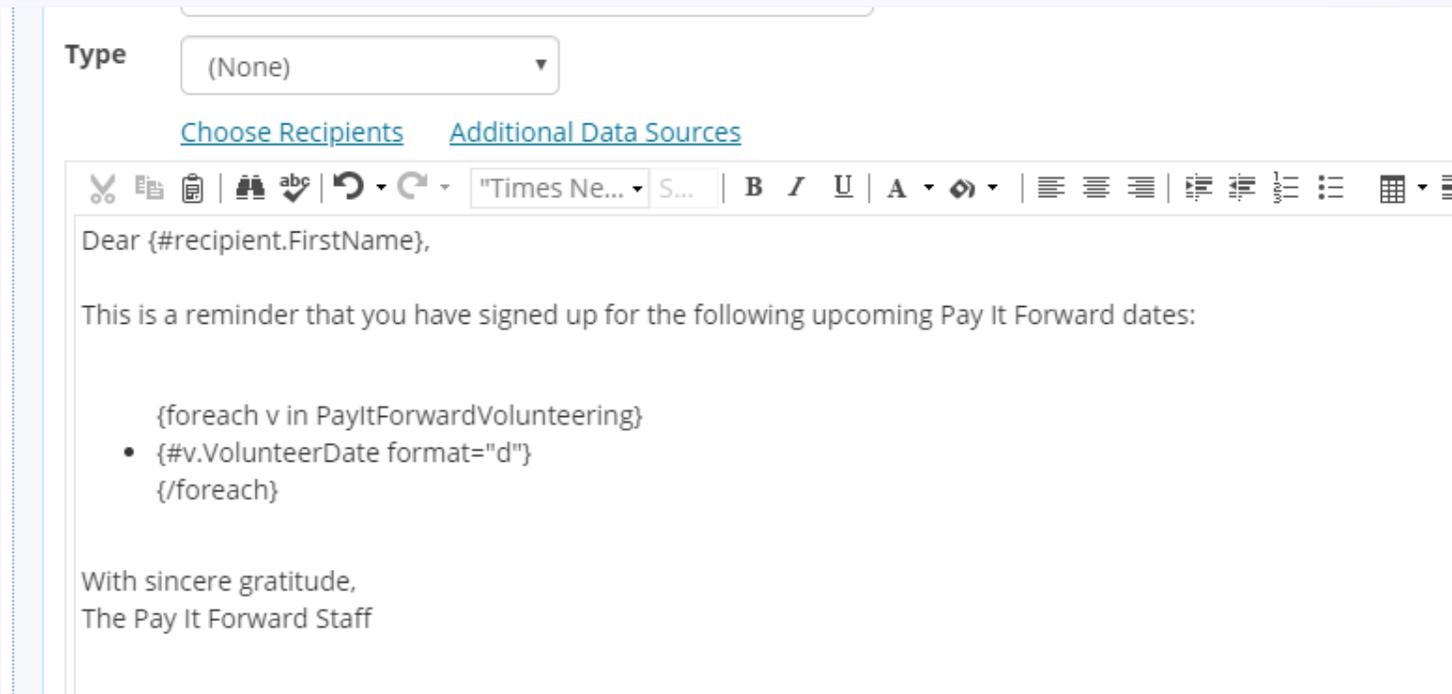
Subject

Type



# Communication Template Tips - continued

- **Data Placeholders can use format attributes to help format things like dates and currency (see resources at end of slides for options) – ie `{#recipient.VolunteerDate format="d"}`**
- **`{foreach}` loops can be used to display repeating data from your Additional data sources**
- **It is recommended to use lists or line breaks only inside of the `{foreach}` as there are some bugs with using a table inside of the `{foreach}`**



The screenshot shows a communication template editor interface. At the top, there is a 'Type' dropdown menu set to '(None)'. Below it are two links: 'Choose Recipients' and 'Additional Data Sources'. A rich text editor toolbar is visible, featuring icons for undo, redo, bold, italic, underline, text color, background color, bulleted list, numbered list, and table. The main text area contains the following content:

Dear `{#recipient.FirstName}`,

This is a reminder that you have signed up for the following upcoming Pay It Forward dates:

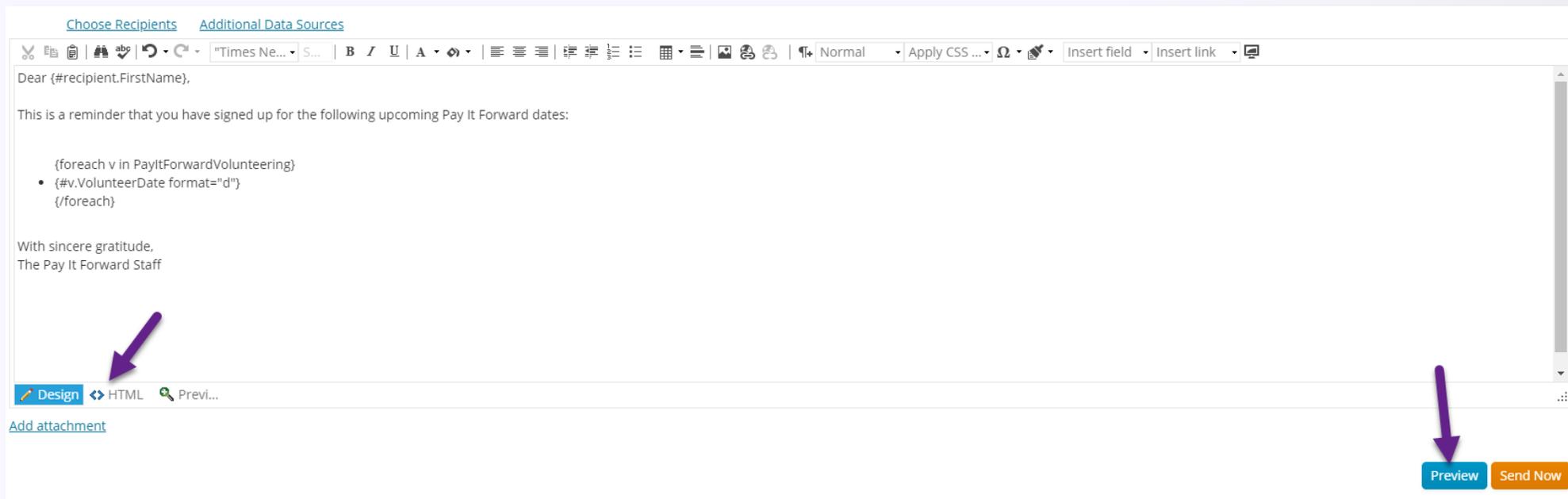
- `{foreach v in PayItForwardVolunteering}`
  - `{#v.VolunteerDate format="d"}``{/foreach}`

With sincere gratitude,  
The Pay It Forward Staff



# Communication Template Tips - continued

- If using images in your email with width and height attributes, Outlook tends to ignore those attributes so try to make the image itself the size you wish it to appear
- Use the preview button to review your emails to make sure recipients and data placeholders fill in as expected.
- If extra spaces appear or things are not formatting as you desire, you can look at the HTML view to make sure HTML tag appear correctly with correct beginning and ending tags where you want them



The screenshot shows an email editor interface. At the top, there are links for "Choose Recipients" and "Additional Data Sources". Below that is a rich text editor toolbar with various icons and options like "Normal", "Apply CSS", "Insert field", and "Insert link". The main content area contains the following text:

Dear {#recipient.FirstName},

This is a reminder that you have signed up for the following upcoming Pay It Forward dates:

- {foreach v in PayItForwardVolunteering}
  - {#v.VolunteerDate format="d"}{/foreach}

With sincere gratitude,  
The Pay It Forward Staff

At the bottom left, there are three tabs: "Design" (selected), "HTML", and "Previ...". A purple arrow points to the "HTML" tab. At the bottom right, there are two buttons: "Preview" and "Send Now". A purple arrow points to the "Preview" button. Below the editor, there is a link for "Add attachment".





# Testing Your Email Tasks - continued

- To avoid filling up your inbox with lots of email when testing, set your IQA filter to limit the number of results returned

The screenshot shows the Intelligent Query Architect (IQA) interface for a query named 'PayItForwardVolunteerThankYou'. The 'Filters' tab is active, displaying a table of filter rules. The 'Limit the number of results returned' checkbox is checked and highlighted with a red box, with the value '1' entered in the adjacent input field.

Where	Property	Function	Comparison	Multiple	Value	Prompt		
Where	Property	None	Within Days		1	No		×
And	Property	None	Less		@date	No		×
Query options					Value			
<input type="checkbox"/> Require user to provide at least one valid value								
<input checked="" type="checkbox"/> Limit the number of results returned					1			



# Testing Your Email Tasks - continued

The screenshot displays a web application interface with a navigation menu at the top including 'About', 'Participation', 'History', 'Giving', 'Activities', 'China', 'Contact Info', 'Member Survey', 'Notes', and 'Preferences'. The 'History' tab is active, showing a 'Recent transactions' table with columns for 'Order Number', 'Order Date', 'Type', 'Amount', and 'Balance'. Below this, a 'Recent interactions' table is highlighted with a red box, containing columns for 'Date', 'Type', 'Subject', and 'Owner'. An email preview window is open, showing the following details:

Date	Type	Subject	Owner
4/13/2020 10:29:12 PM	Email	<a href="#">Volunteer Hours Confirmation</a>	MANAGER
10/7/2016 4:42:20 PM			

The email preview window shows the following content:

**To:** allysonsmith@imisdemo.com  
**CC:**  
**From:** myorg@org.com  
**Subject:** Volunteer Hours Confirmation

Dear Allyson,

This confirms that you have earned 3.00 hours for you volunteer time at the 11/15/2018 Pay It Forward Volunteer event.

It is because of the generosity of your volunteer time that we can help so many people.

With sincere gratitude,  
The Pay It Forward Staff

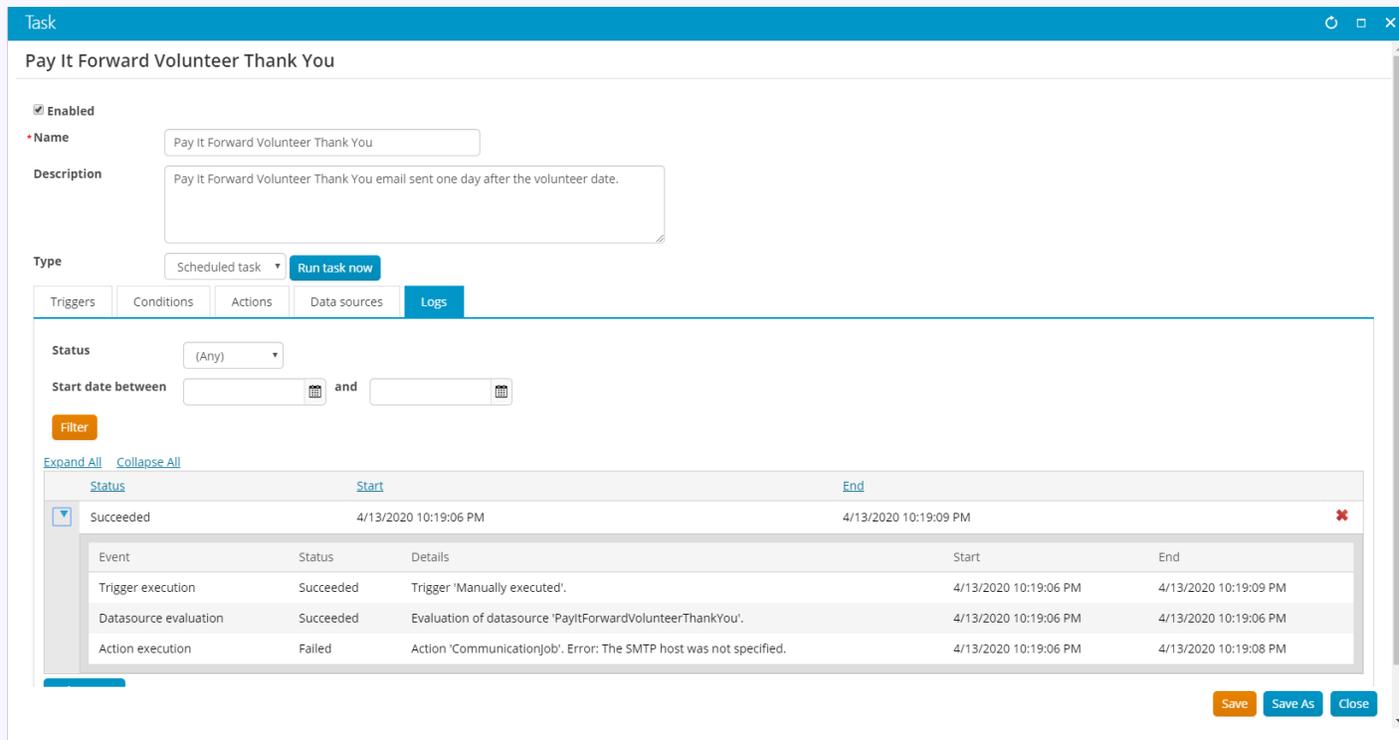
Buttons for 'Resend' and 'Download' are visible next to the 'To' field. A 'Close' button is at the bottom of the preview window.

- You can go to the member profile history tab and view Recent Interactions to verify email sent and recorded for the recipient
- You can also Resend and Download the email as well



# Logs – Making sure things are running!

- Make sure both the Trigger “Enabled” checkbox and the task “Enabled” checkbox are checked
- Check the task Logs Tab to verify things are running properly



The screenshot shows the 'Task' configuration window for 'Pay It Forward Volunteer Thank You'. The 'Enabled' checkbox is checked. The 'Name' field contains 'Pay It Forward Volunteer Thank You' and the 'Description' field contains 'Pay It Forward Volunteer Thank You email sent one day after the volunteer date.'. The 'Type' is set to 'Scheduled task' with a 'Run task now' button. The 'Logs' tab is selected, showing a log entry for a successful trigger execution and a failed action execution.

Status	Start	End
Succeeded	4/13/2020 10:19:06 PM	4/13/2020 10:19:09 PM

Event	Status	Details	Start	End
Trigger execution	Succeeded	Trigger 'Manually executed'.	4/13/2020 10:19:06 PM	4/13/2020 10:19:09 PM
Datasource evaluation	Succeeded	Evaluation of datasource 'PayItForwardVolunteerThankYou'.	4/13/2020 10:19:06 PM	4/13/2020 10:19:06 PM
Action execution	Failed	Action 'CommunicationJob'. Error: The SMTP host was not specified.	4/13/2020 10:19:06 PM	4/13/2020 10:19:08 PM



# Logs – Making sure things are running! - continued

- For email tasks, check the communication logs to verify emails are being sent and delivered
- Click on the email subject to see the list of recipients and email addresses sent to along with specific delivery issue details

The screenshot displays the iMIS Communication Logs interface. On the left is a navigation menu with categories like Community, Membership, Fundraising, Events, Commerce, Marketing, Campaigns, Segmentation, RFM, Process manager, Certification, Finance, Continuum, RISE, and Settings. The 'Communication logs' section is highlighted in red. The main area shows a search bar and filters for subject, date, type, and sender. Below the filters is a table of communication logs with columns for Subject, Sent Date, Communication Type, Message Type, Sent By, Sent, Delivered, and Not Delivered. The first row is selected, and a detailed view is shown on the right. This view includes fields for Subject (Volunteer Hours Confirmation), Sent date (4/13/2020 10:29 PM), Communication type (None), Message type (Email), Sent by (MANAGER), Sent (1), Delivered (1), and Not delivered (0). It also has a 'Find' button and a table of recipients.

Subject	Sent Date	Communication Type	Message Type	Sent By	Sent	Delivered	Not Delivered
<a href="#">Volunteer Hours Confirmation</a>	4/13/2020 10:29:11 PM	None	Email	MANAGER	1	1	0
<a href="#">Thank You for Volunteering</a>	4/13/2020 10:19:06 PM	None	Email	MANAGER	1	1	0
<a href="#">Test Dues</a>	4/13/2020 9:03:51 AM	Billing	Email	MANAGER	3	3	0
<a href="#">Test Dues</a>	4/12/2020 9:03:11 AM	Billing	Email	MANAGER	3	3	0
<a href="#">Test Dues</a>	4/11/2020 9:03:12 AM	Billing	Email	MANAGER	3	3	0
<a href="#">Test Dues</a>	4/10/2020 9:03:09 AM	Billing	Email	MANAGER	3	3	0
<a href="#">Test Dues</a>	4/9/2020 9:03:13 AM	Billing	Email	MANAGER	3	3	0
<a href="#">Test Dues</a>	4/8/2020 9:03:26 AM	Billing	Email	MANAGER	3	3	0
<a href="#">Test Dues</a>	4/7/2020 9:03:46 AM	Billing	Email	MANAGER	3	3	0
<a href="#">Test Dues</a>	4/6/2020 9:03:08 AM	Billing	Email	MANAGER	3	3	0
<a href="#">Test Dues</a>	4/5/2020 9:03:09 AM	Billing	Email	MANAGER	3	3	0
<a href="#">Test Dues</a>	4/4/2020 9:03:08 AM	Billing	Email	MANAGER	3	3	0
<a href="#">Test Dues</a>	4/3/2020 9:03:10 AM	Billing	Email	MANAGER	3	3	0

**Logs for**

Subject: Volunteer Hours Confirmation  
Sent date: 4/13/2020 10:29 PM  
Communication type: None  
Message type: Email  
Sent by: MANAGER  
Sent: 1  
Delivered: 1  
Not delivered: 0

Recipient name contains:

**Find**

Recipient	Recipient Email	Last Status	Details
<a href="#">Allyson Smith</a>	allysonsmith@imisdemo.com	Delivered	



# Resources

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- **iMIS Process Automation Documentation:**  
[https://help.imis.com/iMIS2017/Features/RiSE/Process\\_Automation/Process\\_automation.htm](https://help.imis.com/iMIS2017/Features/RiSE/Process_Automation/Process_automation.htm)
- **iMIS Communication Template Documentation:**  
[https://help.imis.com/iMIS2017/Features/Marketing/Communications/Working\\_with\\_communication\\_templates.htm?Highlight=communication%20templates](https://help.imis.com/iMIS2017/Features/Marketing/Communications/Working_with_communication_templates.htm?Highlight=communication%20templates)
- **Communication Template Placeholder Format Options:**  
<https://docs.microsoft.com/en-us/dotnet/standard/base-types/formatting-types>
- **SQL Server Built-in Functions:**  
[https://www.w3schools.com/sql/sql\\_ref\\_sqlserver.asp](https://www.w3schools.com/sql/sql_ref_sqlserver.asp)



# Next Up...

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Starting at 3:00pm

## ICE Essentials & Latest Updates

- Stay right where you are!

## Fundraising Essentials in RiSE

- Will need to Switch Zoom Links

